



Job Aid - Maintaining Grants – Set-Up Values

State of Kansas



Maintaining Grants – Set-Up Values Job Aid

Statewide Management, Accounting and Reporting Tool



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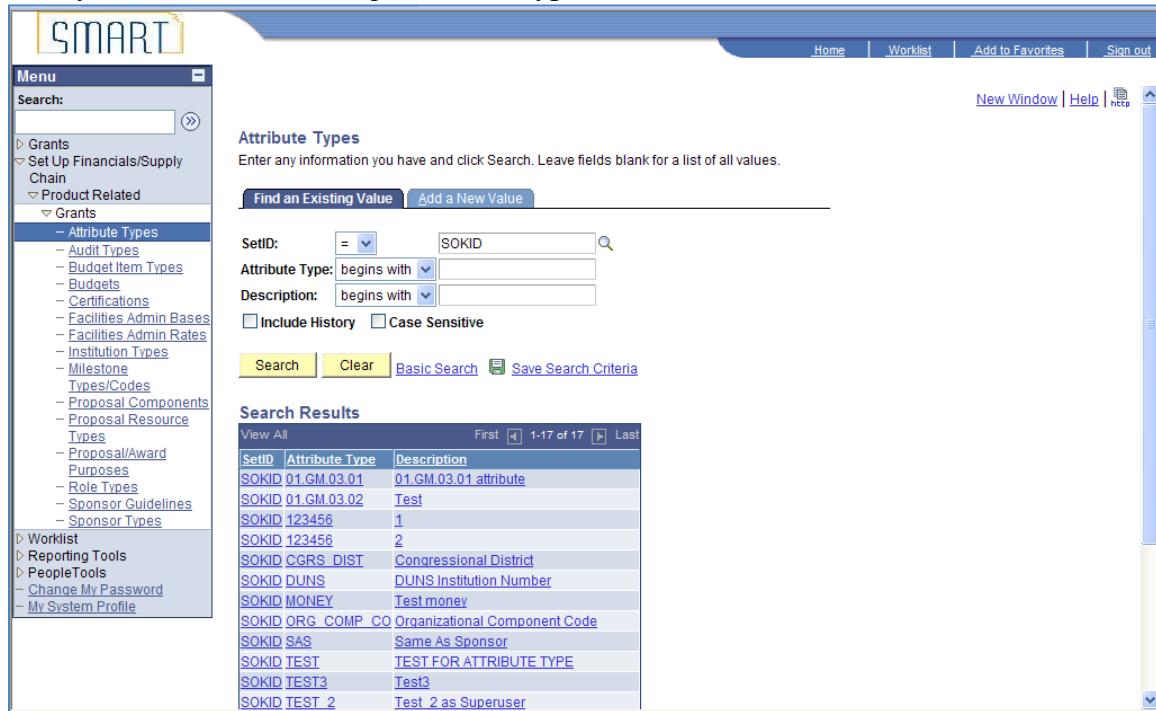
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Update and Maintain Attribute Types

ROLE: AGENCY GRANTS MAINTAINER

PATH: Set Up Financials/Supply Chain > Product Related > Grants > Attribute Types

Here you can find an existing Attribute Type



Attribute Types
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

SetID:

Attribute Type:

Description:

☐ Include History ☐ Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

Search Results
View All First 1-17 of 17 Last

SetID	Attribute Type	Description
SOKID 01.GM.03.01		01.GM.03.01 attribute
SOKID 01.GM.03.02		Test
SOKID 123456		1
SOKID 123456		2
SOKID CGRS_DIST		Congressional District
SOKID DUNS		DUNS Institution Number
SOKID MONEY		Test money
SOKID ORG_COMP_CO		Organizational Component Code
SOKID SAS		Same As Sponsor
SOKID TEST		TEST FOR ATTRIBUTE TYPE
SOKID TEST3		Test3
SOKID TEST_2		Test_2 as Superuser

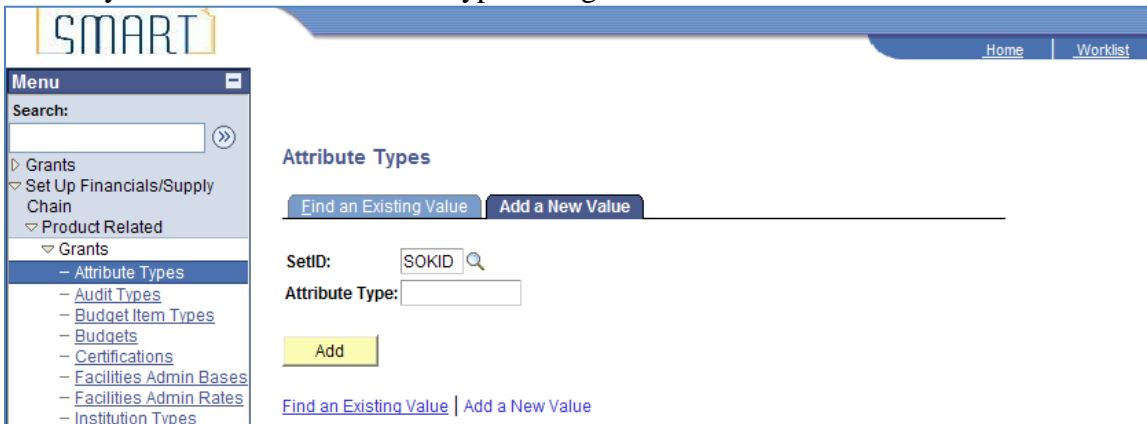
The Grants module delivers data elements for sponsor forms and reports. The **Attribute Types** page establishes a control record that enables you to define all necessary attribute types that are related to the institution. The SMART system delivers four attribute types:

- ORG_COMP_CO: Organizational Component Code
- CGRS_DIST: Congressional District
- DUNS: DUNS Institution Number
- SAS: Same As Sponsor

The FMS Project/Grants Team has provided the initial list of attribute types based on the system delivered values. All agencies will use a common list of attribute types; therefore, when adding new values to this table, agencies will use the statewide SetID of SOKID. Agencies will maintain attribute types after implementation. Since this is a shared table, please be cautious about updating existing values that may be used by other agencies.

Maintaining Grants – Set-Up Values Job Aid

You may add additional Attribute Types using the Statewide SetID of SOKID



Attribute Types

Find an Existing Value | Add a New Value

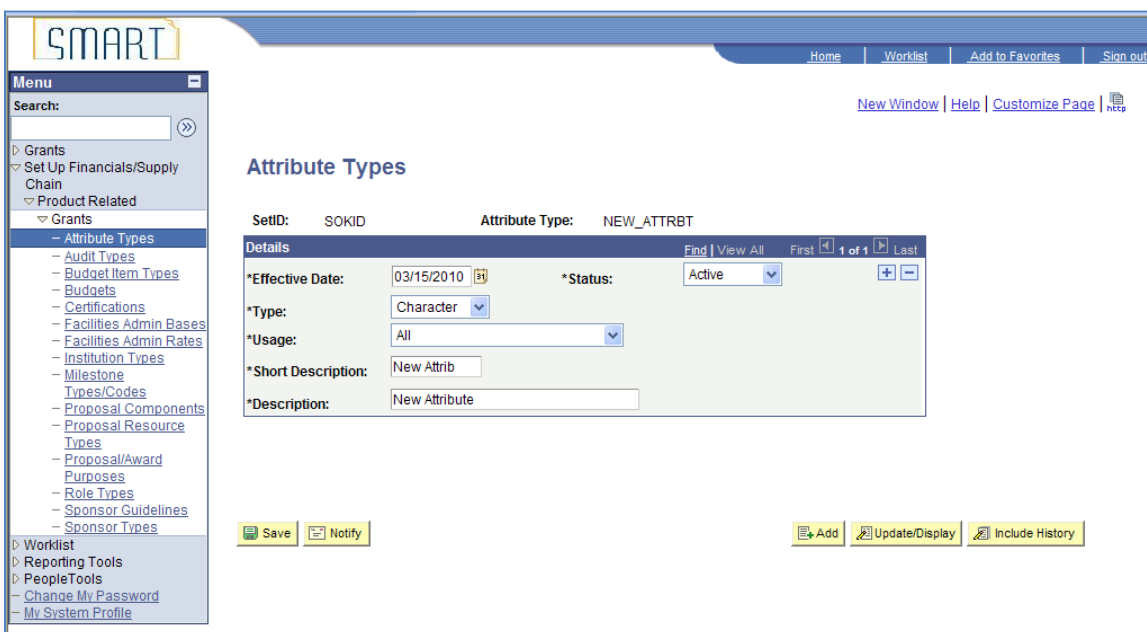
SetID: SOKID

Attribute Type:

Add

Find an Existing Value | Add a New Value

Field Name	Description
SetID	Use the statewide SetID of SOKID
Attribute Type	Enter the Attribute Type as defined by your agency



Attribute Types

SetID: SOKID Attribute Type: NEW_ATTRBT

Details

*Effective Date: 03/15/2010 *Status: Active

*Type: Character

*Usage: All

*Short Description: New Attrib

*Description: New Attribute

Save Notify Add Update/Display Include History

Field Name	Description
Effective Date	Use the Effective Date of the current date for newly created values. If updating an existing value use the appropriate date the change should be effective upon.
Status	Use the available statuses of Active or Inactive.
Type	Select the type. Options are <i>Character</i> or <i>Number</i>
Usage	Select the Usage. Options are <i>Institution</i> , <i>Department</i> , <i>Award</i> , <i>Sponsor</i> , <i>Vendor</i> or <i>All</i> .
Short Description	Provide a short description of the Attribute Type
Description	Provide a description of the Attribute Type

Update and Maintain Audit Types

ROLE: AGENCY GRANTS MAINTAINER

PATH: Set Up Financials/Supply Chain > Product Related > Grants > Audit Types

Here you can find an existing Audit Type



Audit Types
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

SetID:

Audit Type:

Description:

☐ Include History ☐ Case Sensitive

[Basic Search](#)

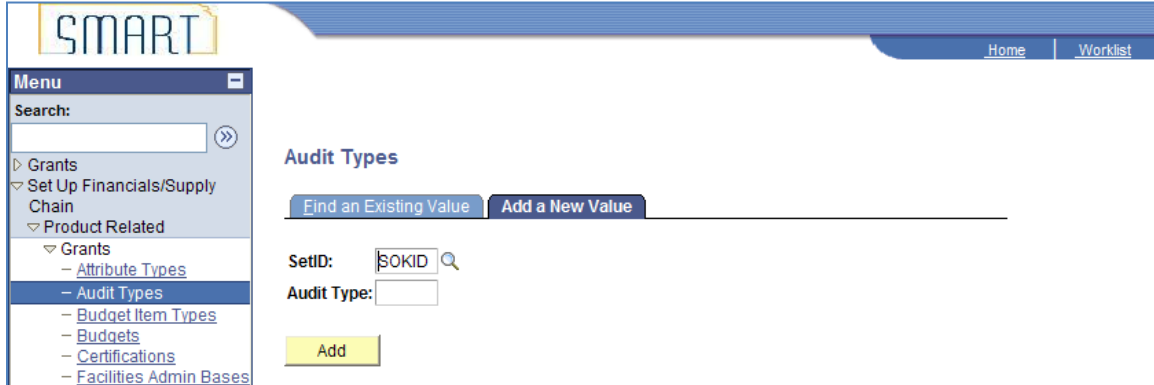
Search Results
View All First 1-9 of 9 Last

SetID	Audit Type	Description
SOKID A133	A-133 Audit	
SOKID CCDF	CCDF	
SOKID FNCL	All Programs	
SOKID FOOD	Food Stamps	
SOKID SSBG	SSBG	
SOKID TANF	TANF	
SOKID TEST1	test security matrix 2	
SOKID TEST1	test security matrix	
SOKID TSTMS	TEST FOR AUDIT TYPE	

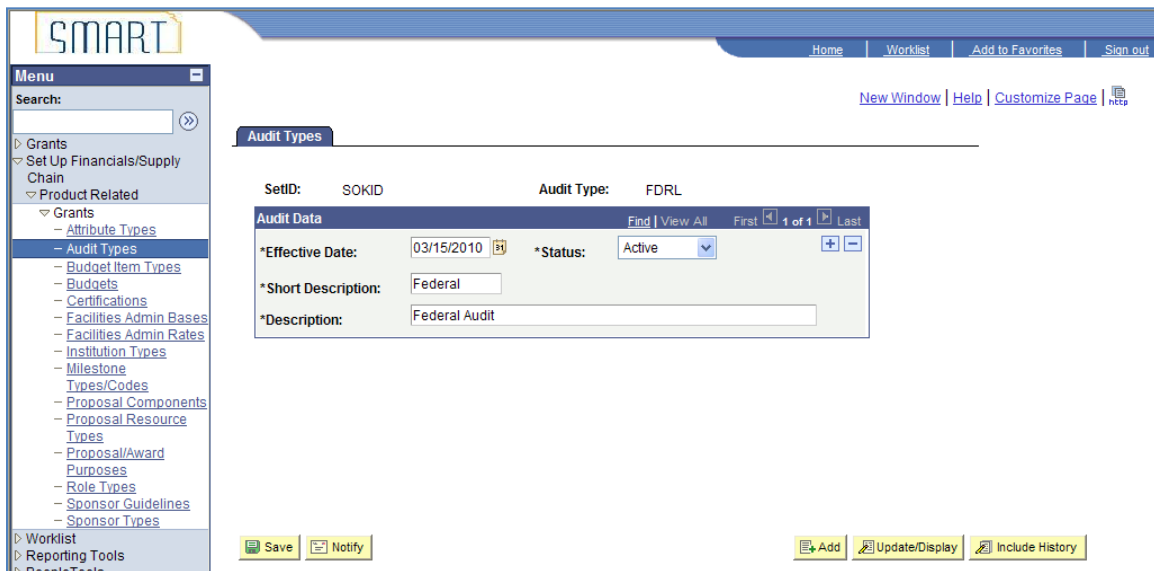
[Find an Existing Value](#) [Add a New Value](#)

Institutional controls enable you to establish audit types. The **Audit Types** page records recent audit engagements in the Grants module. The FMS Projects/Grants Team have provided the initial list of audit types. All agencies will use a common list of audit types; therefore, when adding new values to this table, agencies will use the statewide SetID of SOKID. Agencies will maintain audit types after implementation. Since this is a shared table, please be cautious about updating exiting values that may be used by other agencies.

You may add additional Audit Types using the Statewide SetID of SOKID



Field Name	Description
SetID	Use the statewide SetID of SOKID
Audit Type	Enter the Audit Type as defined by your agency



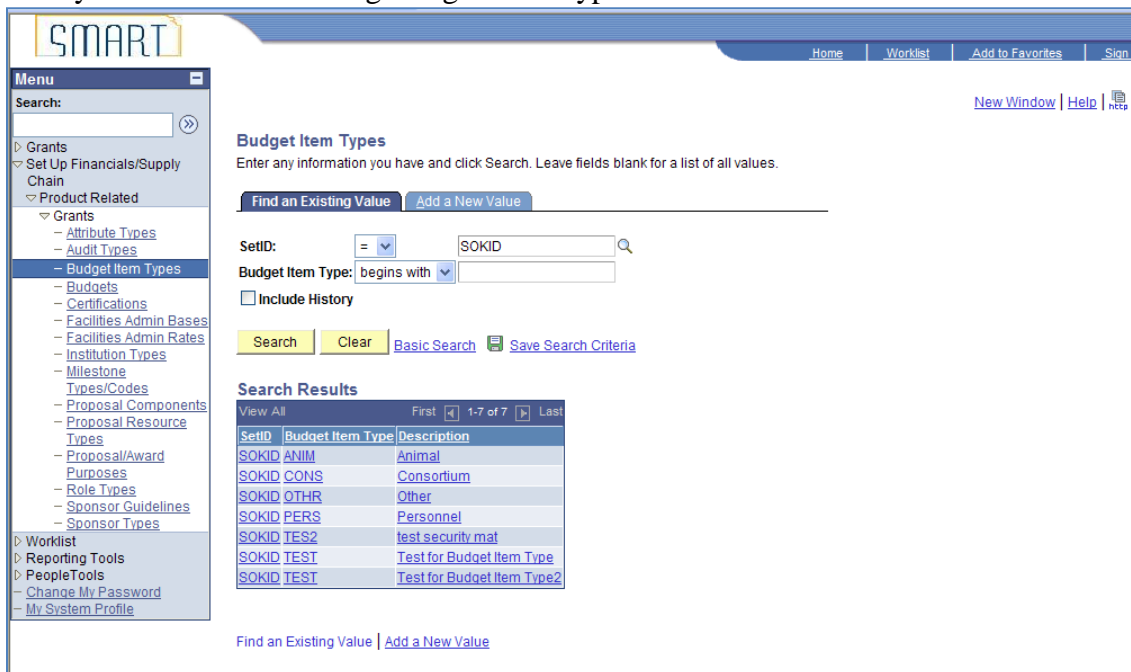
Field Name	Description
Effective Date	Use the Effective Date of the current date for newly created values. If updating an existing value use the appropriate date the change should be effective upon.
Status	Use the available statuses of Active or Inactive
Short Description	Provide a short description of the Audit Type
Description	Provide a description of the Audit Type

Update and Maintain Budget Item Types

ROLE: AGENCY GRANTS MAINTAINER

PATH: Set Up Financials/Supply Chain > Product Related > Grants > Budget Item Types

Here you can find an existing Budget Item Type



Budget Item Types
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

SetID:

Budget Item Type: begins with

☐ Include History

[Basic Search](#) [Save Search Criteria](#)

Search Results

View All First 1-7 of 7 Last

SetID	Budget Item Type	Description
SOKID ANIM	Animal	
SOKID CONS	Consortium	
SOKID OTHR	Other	
SOKID PERS	Personnel	
SOKID TES2	test security mat	
SOKID TEST	Test for Budget Item Type	
SOKID TEST	Test for Budget Item Type2	

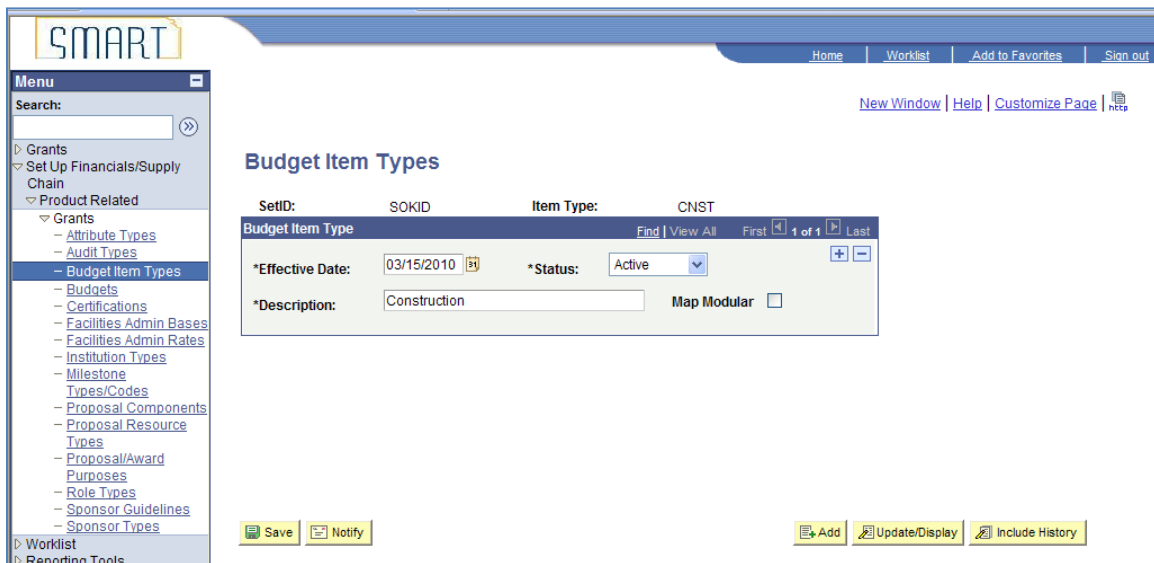
[Find an Existing Value](#) [Add a New Value](#)

Budget Item Types are broad categories into which budget items can be grouped in order to make grant proposal preparation and reporting easier. The FMS Project/Grants Team has provided the initial list of budget item types. All agencies will use a common list of budget item types; therefore, when adding new values to this table, agencies will use the statewide SetID of SOKID. Agencies will maintain budget item types after implementation. Since this is a shared table, please be cautious about updating existing values that may be used by other agencies.

You may add additional Budget Item Types using the Statewide SetID of SOKID



Field Name	Description
SetID	Use the statewide SetID of SOKID
Budget Item Type	Enter the Budget Item Type as defined by your agency



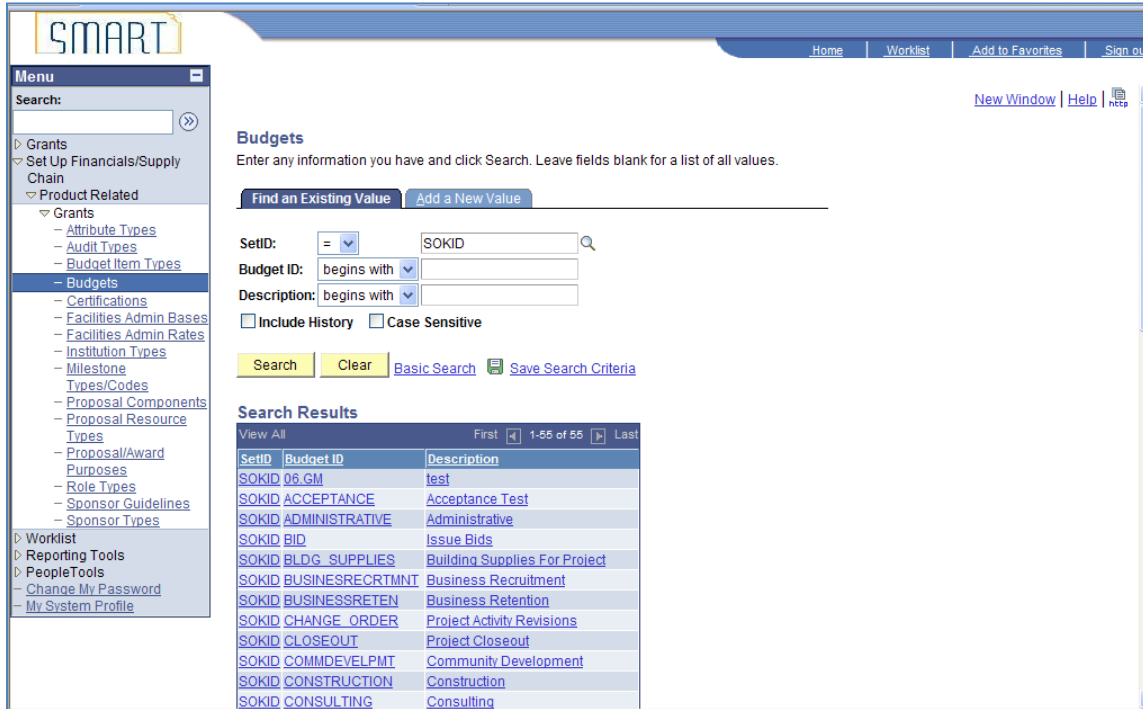
Field Name	Description
Effective Date	Use the Effective Date of the current date for newly created values. If updating an existing value use the appropriate date the change should be effective upon.
Status	Use the available statuses of Active or Inactive
Description	Provide a description of the Budget Item Type

Update and Maintain Budgets

ROLE: AGENCY GRANTS MAINTAINER

PATH: Set Up Financials/Supply Chain > Product Related > Grants > Budgets

Here you can find an existing Budget ID



Budgets
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

SetID:

Budget ID:

Description:

☐ Include History ☐ Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

Search Results
View All First 1-55 of 55 Last

SetID	Budget ID	Description
SOKID	06.GM	test
SOKID	ACCEPTANCE	Acceptance Test
SOKID	ADMINISTRATIVE	Administrative
SOKID	BID	Issue Bids
SOKID	BLDG_SUPPLIES	Building Supplies For Project
SOKID	BUSINESSRECRUITMNT	Business Recruitment
SOKID	BUSINESSRETEEN	Business Retention
SOKID	CHANGE_ORDER	Project Activity Revisions
SOKID	CLOSEOUT	Project Closeout
SOKID	COMMDEVELOPMT	Community Development
SOKID	CONSTRUCTION	Construction
SOKID	CONSULTING	Consulting

The **Budgets** page is used to establish a set of standard Budget IDs that can be selected when entering a detailed proposal budget on a proposal. These Budget IDs eventually become project activities when a proposal is awarded and the generate award process is run. The Budgets page will be configured to align with the Define Activities page since the Budget ID from the GM module will become the Activity ID in the PC module post award. All agencies will use a common list of Budget IDs; therefore, when adding new values to this table, agencies will use the statewide SetID of SOKID. Agencies will maintain Budget IDs after implementation. Since this is a shared table, please be cautious about updating existing values that may be used by other agencies.

You may add additional Budget IDs using the Statewide SetID of SOKID



Budgets

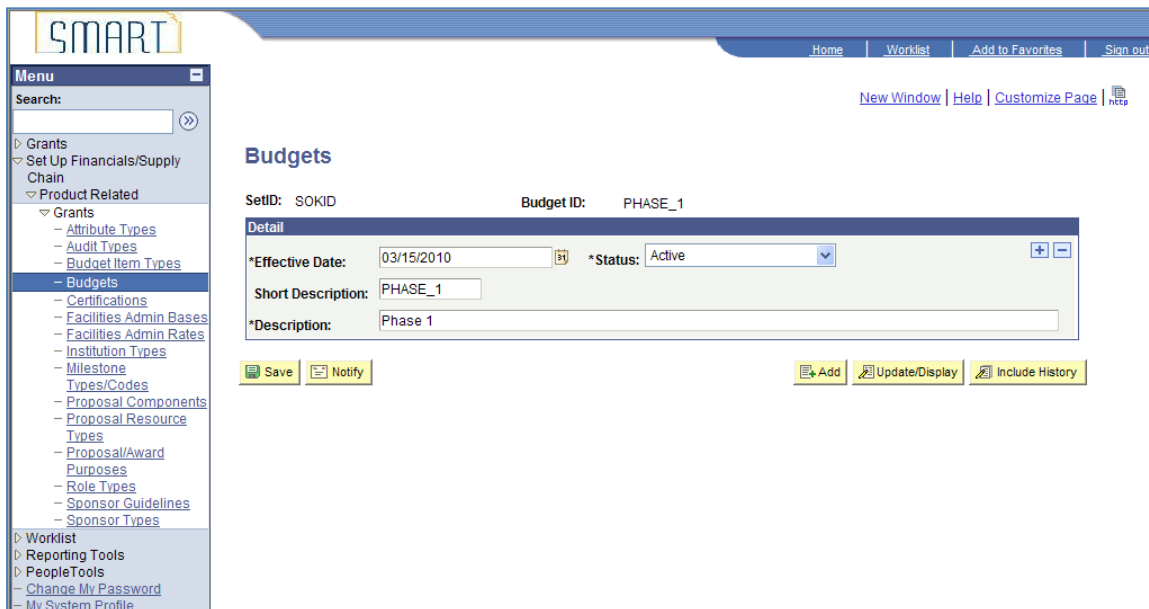
[Find an Existing Value](#) [Add a New Value](#)

SetID:

Budget ID:

[Find an Existing Value](#) | [Add a New Value](#)

Field Name	Description
SetID	Use the statewide SetID of SOKID
Budget ID	Enter the Budget ID as defined by your agency



Budgets

SetID: SOKID Budget ID: PHASE_1

Detail

*Effective Date: *Status:

Short Description:

*Description:

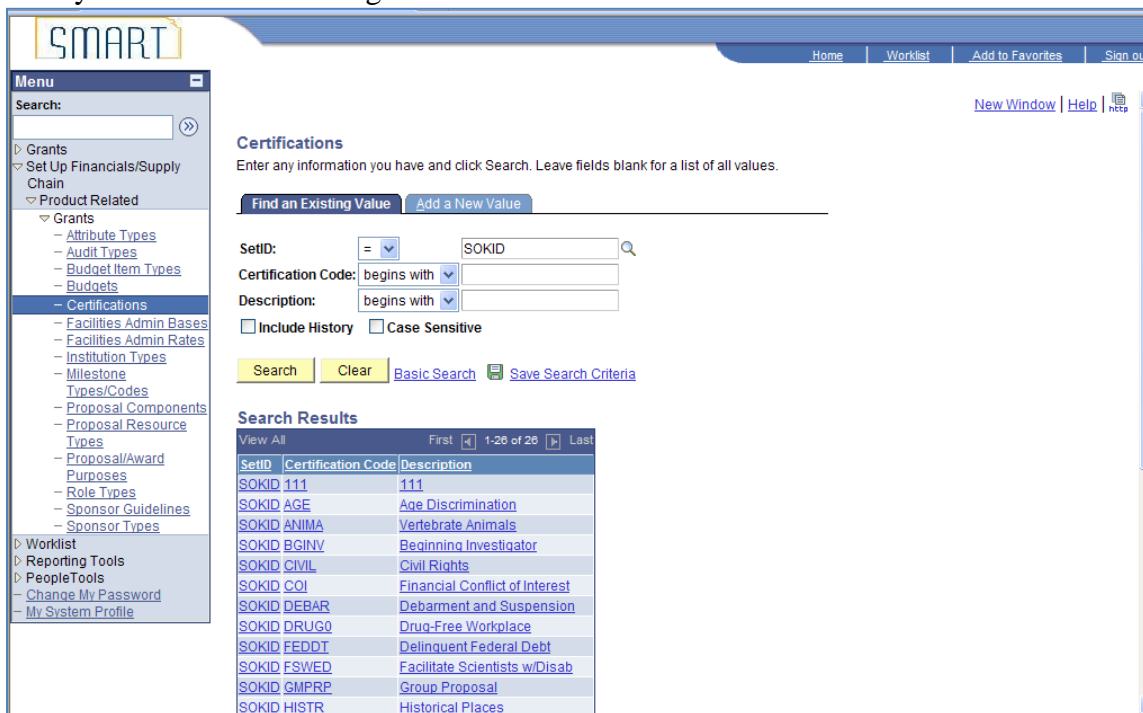
Field Name	Description
Effective Date	Use the Effective Date of the current date for newly created values. If updating an existing value use the appropriate date the change should be effective upon.
Status	Use the available statuses of Active or Inactive
Short Description	Provide a short description of the Budget ID
Description	Provide a description of the Budget ID

Update and Maintain Certifications

ROLE: AGENCY GRANTS MAINTAINER

PATH: Set Up Financials/Supply Chain > Product Related > Grants > Certifications

Here you can find an existing Certification



Menu

Search:

- Grants
 - Set Up Financials/Supply Chain
 - Product Related
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 - Attribute Types
 - Audit Types
 - Budget Item Types
 - Budgets
 - Certifications**
 - Facilities Admin Bases
 - Facilities Admin Rates
 - Institution Types
 - Milestone Types/Codes
 - Proposal Components
 - Proposal Resource Types
 - Proposal/Award Purposes
 - Role Types
 - Sponsor Guidelines
 - Sponsor Types
- Worklist
- Reporting Tools
- PeopleTools
 - Change My Password
 - My System Profile

Certifications

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

SetID: = SOKID

Certification Code: begins with

Description: begins with

☐ Include History ☐ Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

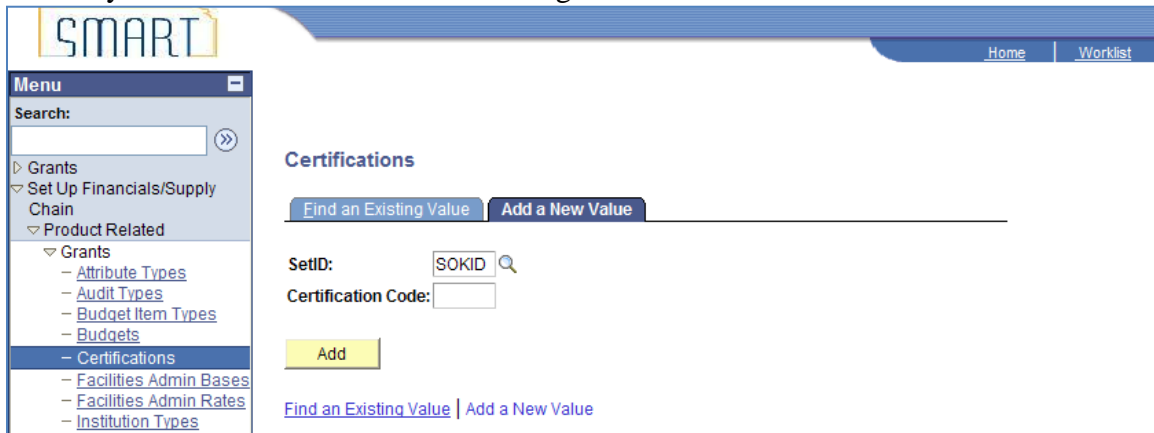
Search Results

View All First 1-26 of 26 Last

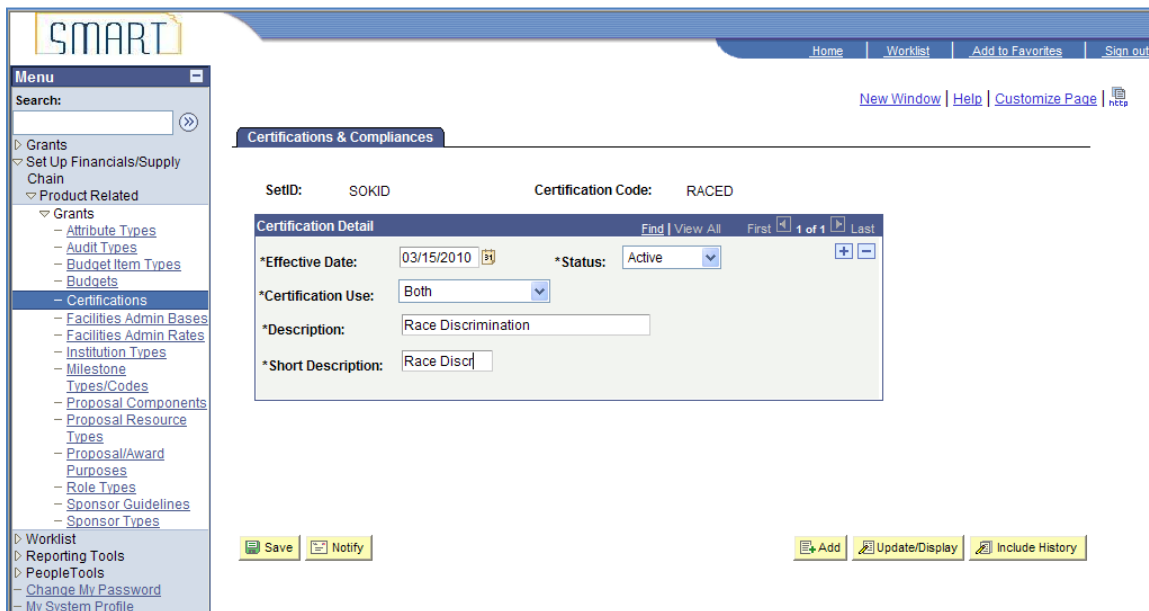
SetID	Certification Code	Description
SOKID	111	111
SOKID	AGE	Age Discrimination
SOKID	ANIMA	Vertebrate Animals
SOKID	BGINV	Beginning Investigator
SOKID	CIVIL	Civil Rights
SOKID	COI	Financial Conflict of Interest
SOKID	DEBAR	Debarment and Suspension
SOKID	DRUG0	Drug-Free Workplace
SOKID	FEDDT	Delinquent Federal Debt
SOKID	FSWED	Facilitate Scientists w/Disab
SOKID	GMPRP	Group Proposal
SOKID	HISTR	Historical Places

The **Certifications** page is used to define certification types, which are then selected on the Grants Institution Certifications & Compliance page to indicate which federal certifications an institution has obtained. The FMS Projects/Grants Team has provided the initial list of certification types. All agencies will use a common list of certifications; therefore, when adding new values to this table, agencies will use the statewide SetID of SOKID. Agencies will maintain certifications after implementation. Since this is a shared table, please be cautious about updating existing values that may be used by other agencies.

You may add additional Certifications using the Statewide SetID of SOKID



Field Name	Description
SetID	Use the statewide SetID of SOKID
Certification Code	Enter the Certification Code as defined by your agency



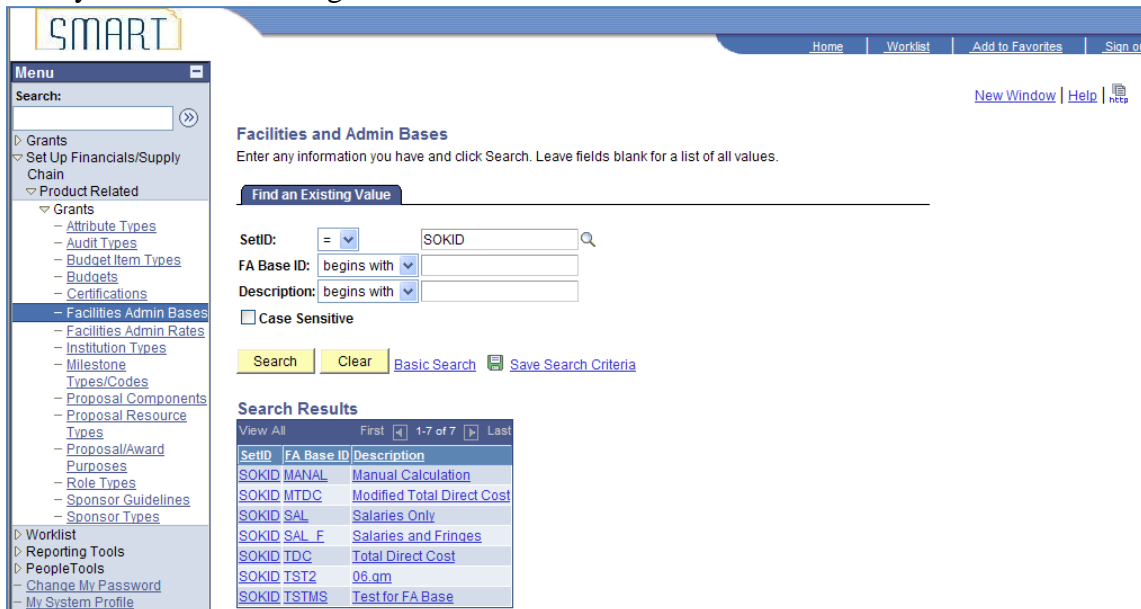
Field Name	Description
Effective Date	Use the Effective Date of the current date for newly created values. If updating an existing value use the appropriate date the change should be effective upon.
Status	Use the available statuses of Active or Inactive
Certification Use	Select a Certification Use. The Options are <i>Institution Certification</i> , <i>Proposal Certification</i> or <i>Both</i>
Description	Provide a description of the Certification Code
Short Description	Provide a short description of the Certification Code

Update and Maintain Facilities Admin Bases

ROLE: AGENCY GRANTS MAINTAINER

PATH: Set Up Financials/Supply Chain > Product Related > Grants > Facilities Admin Bases

Here you can find existing Facilities Admin Bases



The screenshot shows the SMART web application interface. On the left is a 'Menu' sidebar with a search bar and a tree view. The tree view is expanded to 'Grants' > 'Set Up Financials/Supply Chain' > 'Product Related' > 'Grants' > 'Facilities Admin Bases'. The main content area is titled 'Facilities and Admin Bases' and contains a search form. The search form has fields for 'SetID', 'FA Base ID', and 'Description', each with a dropdown menu and a text input. There are also buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. Below the search form is a 'Search Results' section showing a table of results.

SetID	FA Base ID	Description
SOKID	MANAL	Manual Calculation
SOKID	MTDC	Modified Total Direct Cost
SOKID	SAL	Salaries Only
SOKID	SAL_F	Salaries and Fringes
SOKID	TDC	Total Direct Cost
SOKID	TST2	06.qm
SOKID	TSTMS	Test for FA Base

The Grants module comes delivered with a process that calculates and stores F&A costs, user-definable F&A base types, and effective-dated F&A rates. This process calculates F&A on the applicable sponsor-funded amounts as well as any waived and cost-shared F&A amounts. The base is significant in that users can select the budget items that belong to the F&A base type that you create. The FMS Project/Grants Team has worked with agencies to setup and define the **Facilities and Admin Bases**. Your Agency Tree Manger will maintain the account values that fall under each Facilities and Admin Base via your agency F&A tree.

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Statewide Management, Accounting and Reporting Tool

You can view the budget items associated with each F&A base on this page



SMART Home Worklist Add to Favorites Sign out

[New Window](#) | [Help](#) | [Customize Page](#) | [Help](#)

Menu

Search:

- Grants
 - Set Up Financials/Supply Chain
 - Product Related
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 - [Audit Types](#)
 - [Budget Item Types](#)
 - [Budgets](#)
 - [Certifications](#)
 - [Facilities Admin Bases](#)
 - [Facilities Admin Rates](#)
 - [Institution Types](#)
 - [Milestone Types/Codes](#)
 - [Proposal Components](#)
 - [Proposal Resource Types](#)
 - [Proposal/Award Purposes](#)
 - [Role Types](#)
 - [Sponsor Guidelines](#)
 - [Sponsor Types](#)
 - Worklist
 - Reporting Tools
 - People Tools
 - [Change My Password](#)
 - [My System Profile](#)

Facilities and Administration Bases

SetID: SOKID FA Base ID: MTDC

Details Find | View All First 1 of 1 Last

Effective Date: 01/01/1901 Status: Active

Description: Modified Total Direct Cost

Budget Item Details Customize | Find | First 1-14 of 14 Last

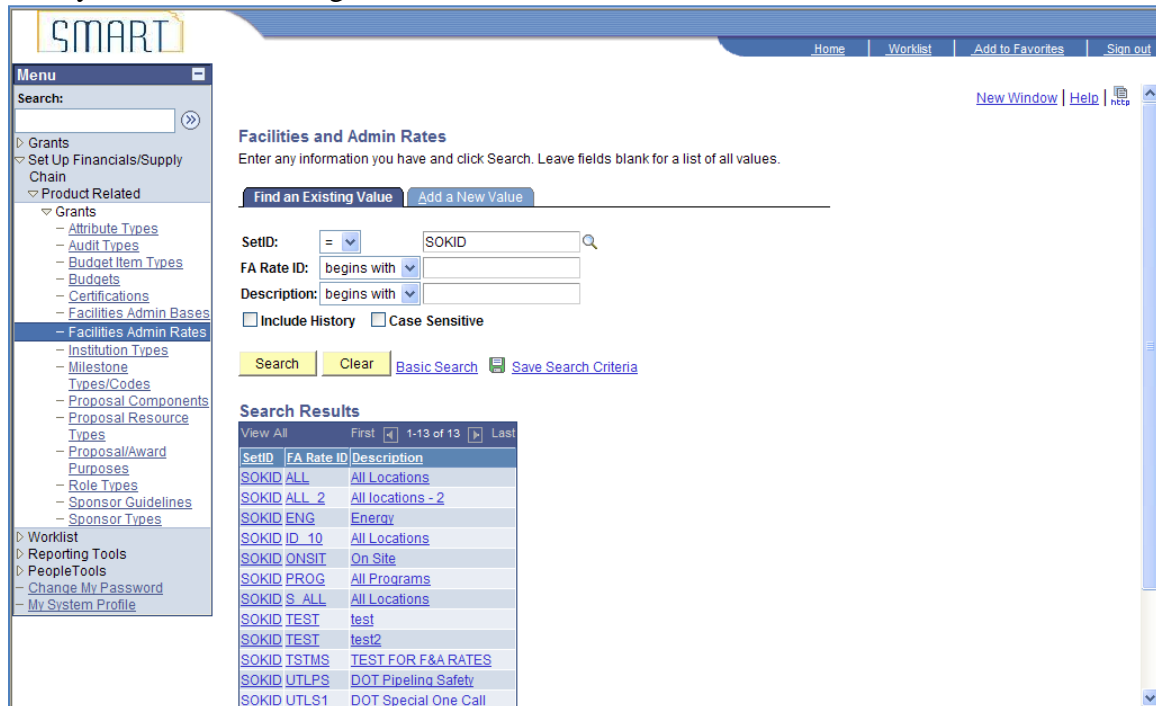
Budget Item	Description
DOTRAV	Domestic Travel
FOTRAV	Foreign Travel
FRINGE	Fringe Benefits
OTHER	Other Direct Costs
PARTSPT	Participant Support
PUBLISH	Publication Costs
RENT	Equip or Facil Rental/User Fee
SALARIES	Salaries & Wages
STIPEND	Stipends
SUB<25K	Subcontracts less than \$25K
SUPL	Materials & Supplies
TRNTHR	Trainee Other
TRNSTPND	Trainee Stipends
TRNTRV	Trainee Travel

Update and Maintain Facilities and Admin Rates

ROLE: AGENCY GRANTS MAINTAINER

PATH: Set Up Financials/Supply Chain > Product Related > Grants > Facilities Admin Rates

Here you can find existing Facilities Admin Rates



Facilities and Admin Rates
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

SetID:

FA Rate ID:

Description:

☐ Include History ☐ Case Sensitive

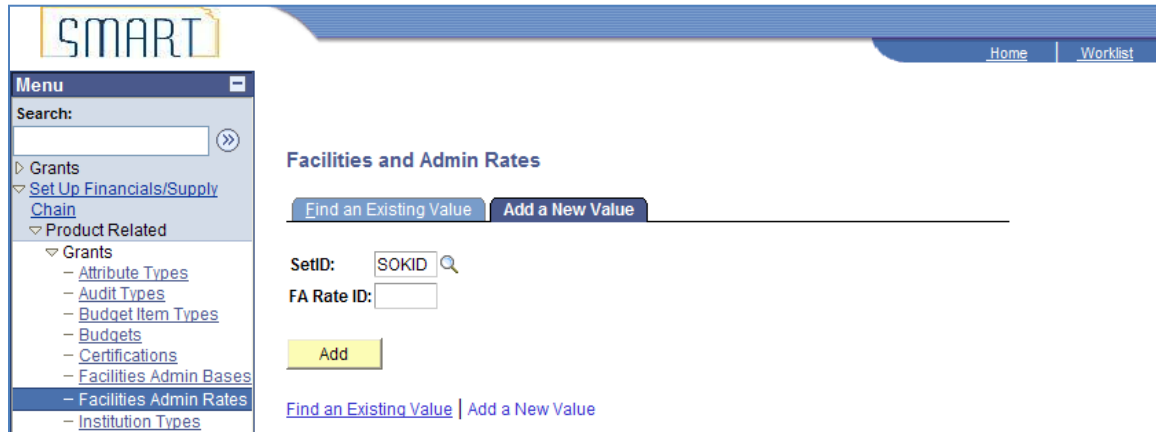
[Basic Search](#) [Save Search Criteria](#)

Search Results
View All First 1-13 of 13 Last

SetID	FA Rate ID	Description
SOKID ALL		All Locations
SOKID ALL_2		All Locations - 2
SOKID ENG		Energy
SOKID ID_10		All Locations
SOKID ONSIT		On Site
SOKID PROG		All Programs
SOKID S_ALL		All Locations
SOKID TEST		test
SOKID TEST		test2
SOKID TSTMS		TEST FOR F&A RATES
SOKID UTLPS		DOT Pipelining Safety
SOKID UTL1		DOT Special One Call

The **Facilities Admin Rates** page controls what types of facilities and administrative (F&A) rates are available to be associated with the various institutions, grants, and projects throughout the entire SMART system. The FMS Projects/Grants Team has setup the initial list of F&A Rates based on agency input. All agencies will use a common list of F&A Rates; therefore, when adding new values to this table, agencies will use the statewide SetID of SOKID. Agencies will maintain F&A Rates after implementation. Since this is a shared table, please be cautious about updating existing values that may be used by other agencies.

You may add additional Facilities and Admin Rates using the Statewide SetID of SOKID



SMART Home Worklist

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Search: []

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 - Budget Item Types
 - Budgets
 - Certifications
 - Facilities Admin Bases
 - Facilities Admin Rates**
 - Institution Types

Facilities and Admin Rates

Find an Existing Value Add a New Value

SetID: SOKID

FA Rate ID: []

Add

Find an Existing Value Add a New Value

Field Name	Description
SetID	Use the statewide SetID of SOKID
FA Rate ID	Enter the FA Rate ID as defined by your agency



SMART Home Worklist Add to Favorites Sign out

New Window Help Customize Page

Menu

Search: []

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 - Role Types
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 - Sponsor Types
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 - Change My Password
 - My System Profile

Facilities and Administration Rates

SetID: SOKID FA Rate ID: OFF_S

Customize Find First 1 of 1 Last

*Effective Date	*Status	*Description	*Short Description
03/15/2010	Active	Off Site	OFF

Save Notify Add Update/Display Include History

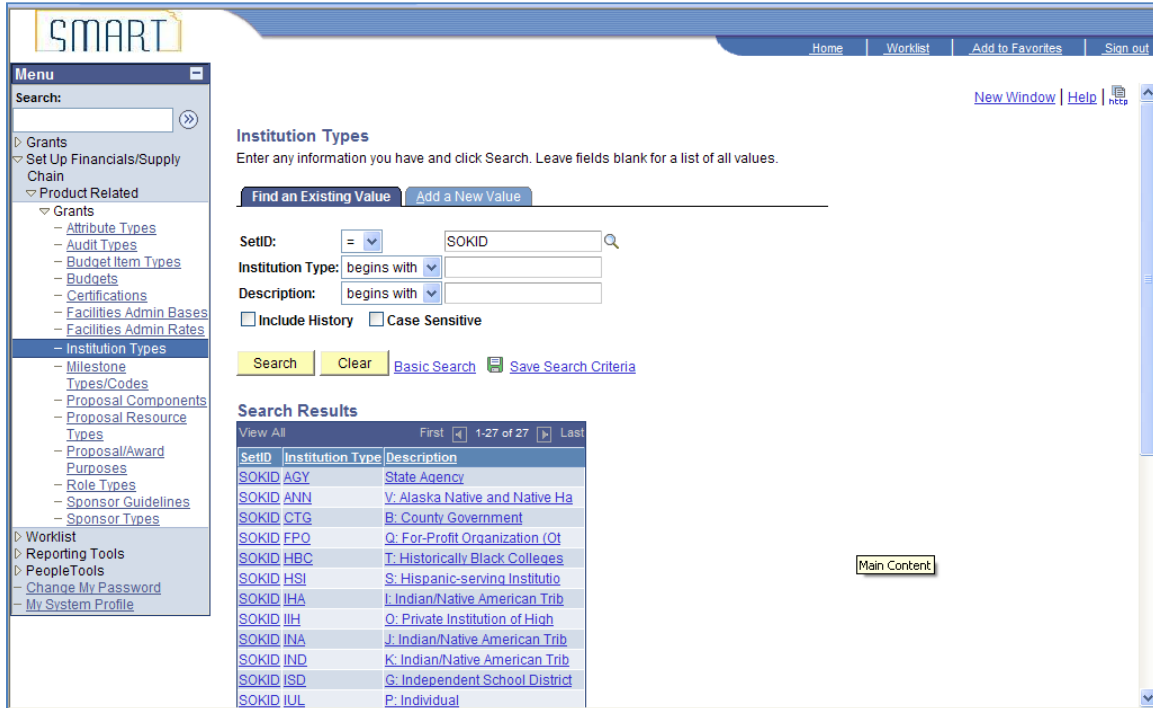
Field Name	Description
Effective Date	Use the Effective Date of the current date for newly created values. If updating an existing value use the appropriate date the change should be effective upon.
Status	Use the available statuses of Active or Inactive
Description	Provide a description of the F&A Rate
Short Description	Provide a short description of the F&A Rate

Update and Maintain Institution Types

ROLE: AGENCY GRANTS MAINTAINER


PATH: Set Up Financials/Supply Chain > Product Related > Grants > Institution Types

Here you can find existing Institution Types



SMART Statewide Management, Accounting and Reporting Tool

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Menu

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 - My System Profile

Institution Types

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

SetID: = SOKID

Institution Type: begins with

Description: begins with

☐ Include History ☐ Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

Search Results

View All First 1-27 of 27 Last

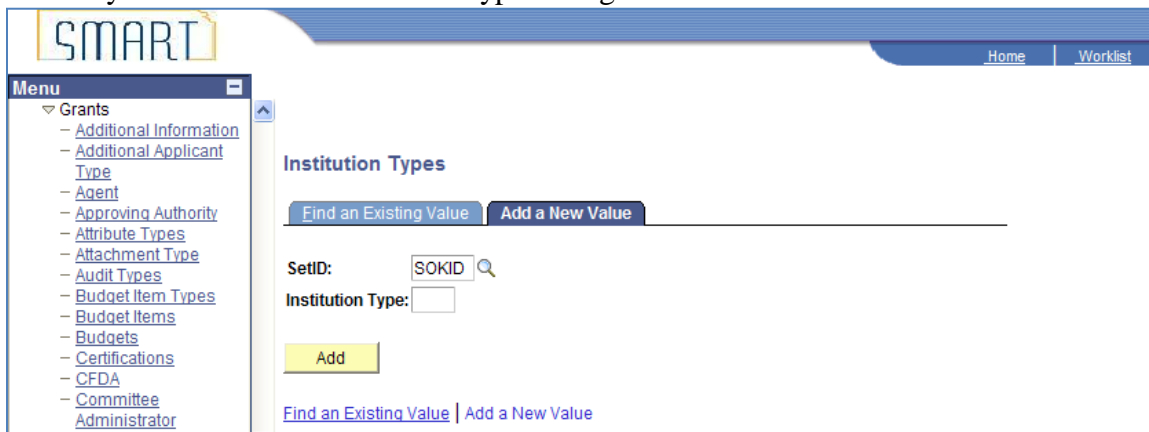
SetID	Institution Type	Description
SOKID AGY		State Agency
SOKID ANN		V: Alaska Native and Native Ha
SOKID CTG		B: County Government
SOKID FPQ		Q: For-Profit Organization (O)
SOKID HBC		T: Historically Black Colleges
SOKID HSI		S: Hispanic-serving Institution
SOKID IHA		I: Indian/Native American Trib
SOKID IHH		O: Private Institution of High
SOKID INA		J: Indian/Native American Trib
SOKID IND		K: Indian/Native American Trib
SOKID ISD		G: Independent School District
SOKID IUL		P: Individual

[Main Content](#)

Institution Types can be setup within the SMART system. The federal form Application for Federal Assistance includes a required field that the grant applicant must complete that designates the applicant type (institution type). The FMS Projects/Grants Team will setup the institution types using the delivered values in SMART. All agencies will use a common list of Institution Types; therefore, when adding new values to this table, agencies will use the statewide SetID of SOKID. Agencies will maintain Institution Types after implementation. Since this is a shared table, please be cautious about updating existing values that may be used by other agencies.

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You may add additional Institution Types using the Statewide SetID of SOKID



SMART

Home | Worklist

Menu

- Grants
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 - Additional Applicant Type
 - Agent
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 - Attribute Types
 - Attachment Type
 - Audit Types
 - Budget Item Types
 - Budget Items
 - Budgets
 - Certifications
 - CFDA
 - Committee Administrator
 - Committee Meeting

Institution Types

Find an Existing Value | Add a New Value

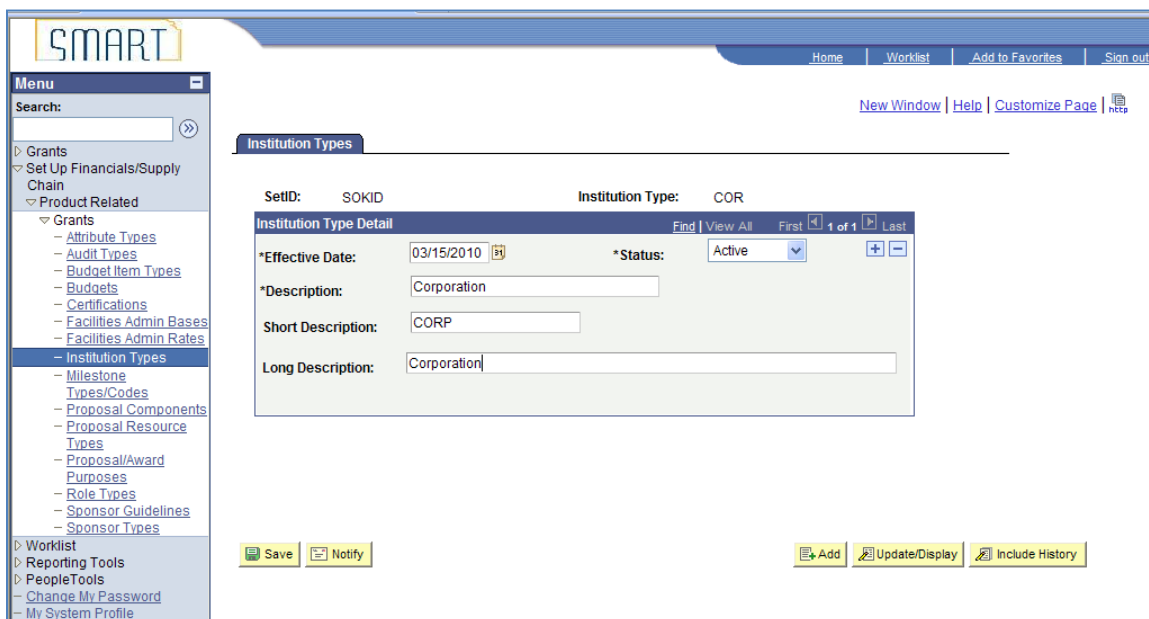
SetID: SOKID

Institution Type:

Add

Find an Existing Value | Add a New Value

Field Name	Description
SetID	Use the statewide SetID of SOKID
Institution Type	Enter the Institution Type as defined by your agency



SMART

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Menu

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 - Proposal/Award Purposes
 - Role Types
 - Sponsor Guidelines
 - Sponsor Types
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 - My System Profile

Institution Types

SetID: SOKID Institution Type: COR

Institution Type Detail

Find | View All First 1 of 1 Last

*Effective Date: 03/15/2010 *Status: Active

*Description: Corporation

Short Description: CORP

Long Description: Corporation

Save Notify Add Update/Display Include History

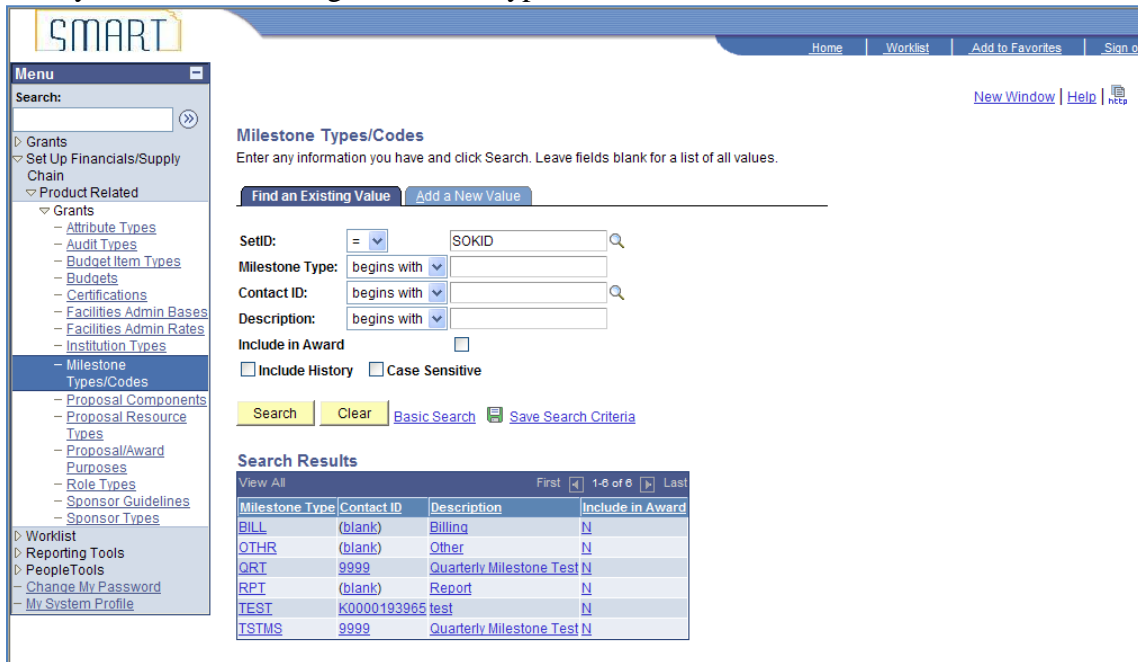
Field Name	Description
Effective Date	Use the Effective Date of the current date for newly created values. If updating an existing value use the appropriate date the change should be effective upon.
Status	Use the available statuses of Active or Inactive
Description	Provide a description of the Institution Type
Short Description	Provide a short description of the Institution Type
Long Description	Provide a long description of the Institution Type

Update and Maintain Milestone Types/Codes

ROLE: AGENCY GRANTS MAINTAINER

PATH: Set Up Financials/Supply Chain > Product Related > Grants > Milestone Types/Codes

Here you can find existing Milestone Types/Codes



Milestone Types/Codes
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

SetID: = SOKID

Milestone Type: begins with

Contact ID: begins with

Description: begins with

Include in Award ☐

☐ Include History ☐ Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

Search Results

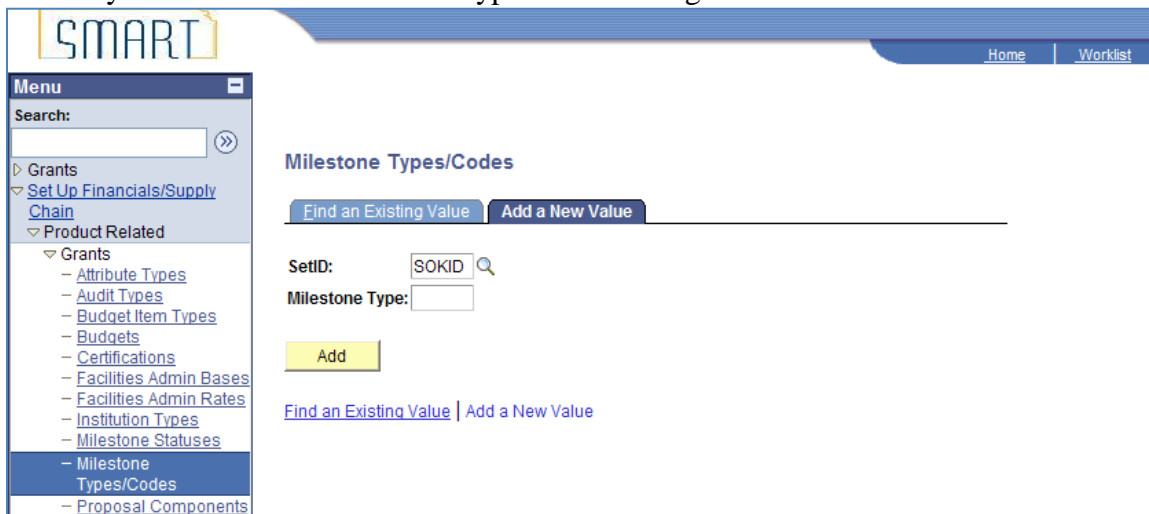
View All First 1-6 of 6 Last

Milestone Type	Contact ID	Description	Include in Award
BILL	(blank)	Billing	N
OTHR	(blank)	Other	N
QRT	9999	Quarterly Milestone Test	N
RPT	(blank)	Report	N
TEST	K0000193965	test	N
TSTMS	9999	Quarterly Milestone Test	N

The **Milestone Types/Codes** page is used to define the types of milestones an institution can associate with its specific grants in the Grants module. Milestone types might include proposal deadlines, deliverables and reporting requirements. Milestone types are then linked with individual milestones, known as milestone codes, for reporting purposes. The FMS Projects/Grants Team has provided the initial list of milestone types and codes. All agencies will use a common list of Milestone Types/Codes; therefore, when adding new values to this table, agencies will use the statewide SetID of SOKID. Agencies will maintain Milestone Types/Codes after implementation. Since this is a shared table, please be cautious about updating existing values that may be used by other agencies.

Maintaining Grants – Set-Up Values Job Aid

You may add additional Milestone Types/Codes using the Statewide SetID of SOKID



Milestone Types/Codes

Find an Existing Value | Add a New Value

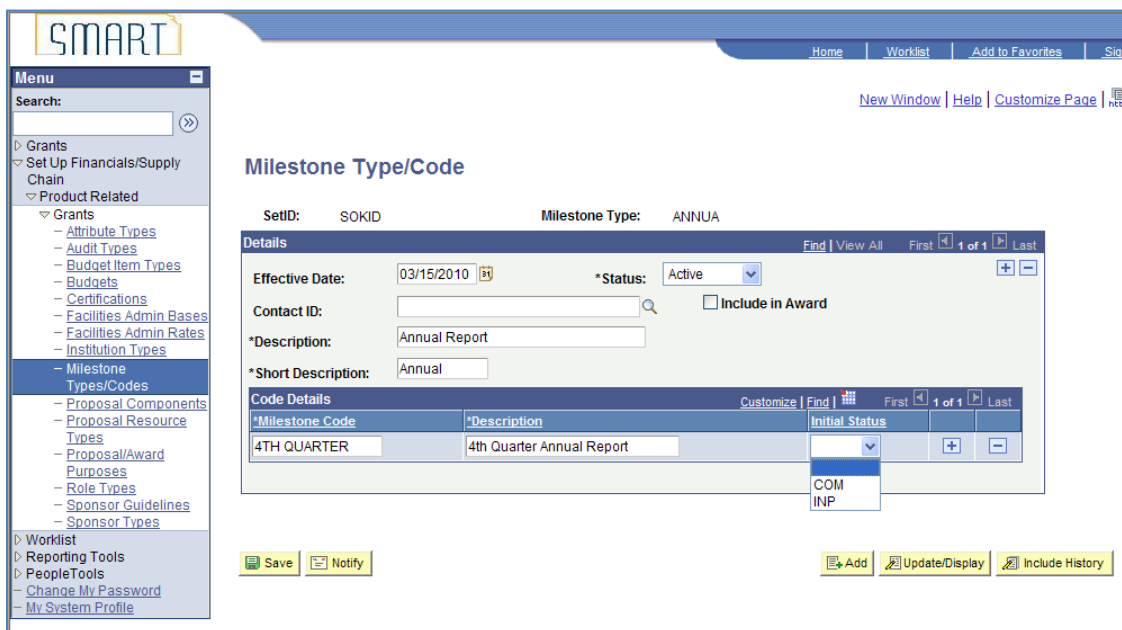
SetID: SOKID

Milestone Type:

Add

Find an Existing Value | Add a New Value

Field Name	Description
SetID	Use the statewide SetID of SOKID
Milestone Type	Enter the Milestone Type as defined by your agency



Milestone Type/Code

SetID: SOKID Milestone Type: ANNUA

Details

Effective Date: 03/15/2010 *Status: Active

Contact ID: Include in Award

*Description: Annual Report

*Short Description: Annual

*Milestone Code	*Description	Initial Status
4TH QUARTER	4th Quarter Annual Report	COM INP

Save Notify Add Update/Display Include History

Field Name	Description
Effective Date	Use the Effective Date of the current date for newly created values. If updating an existing value use the appropriate date the change should be effective upon.
Status	Use the available statuses of Active or Inactive
Contact ID	Choose the Contact ID for the Milestone, if applicable
Include in Award	Select checkbox if Milestone should included at award generation



Maintaining Grants – Set-Up Values Job Aid

Statewide Management, Accounting and Reporting Tool



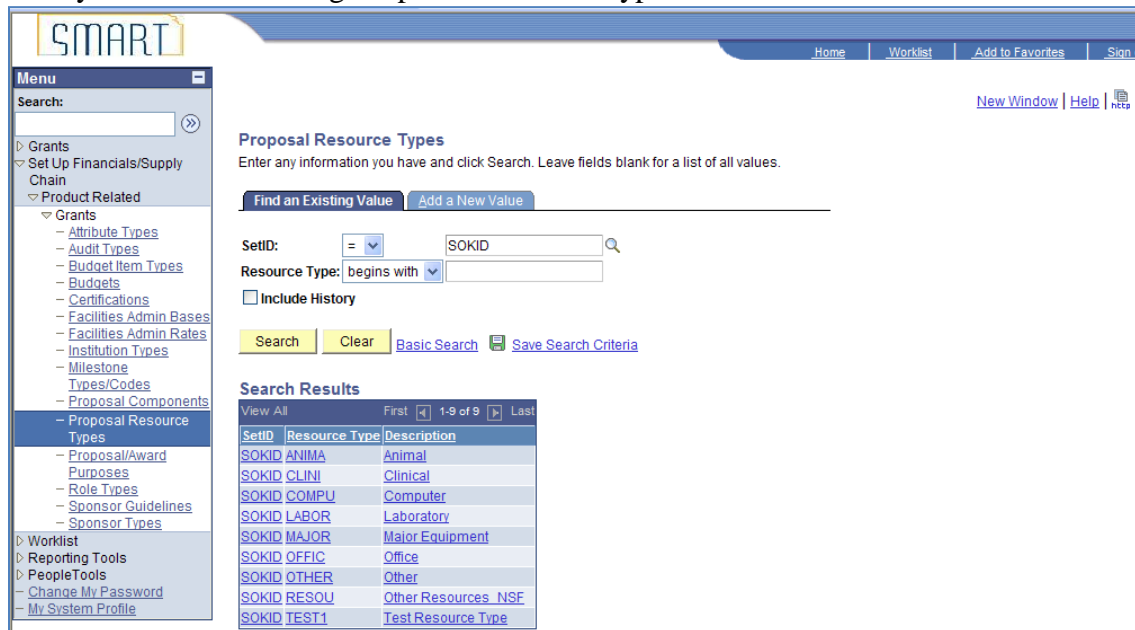
Description	Provide a description of the Milestone Type
Short Description	Provide a short description of the Milestone Type
Milestone Code	Select the individual milestone code associated with the specified milestone type
Description	Enter a description of the Milestone Type
Initial Status	Select the initial status of the Milestone Type. Options include <i>COM</i> (<i>Complete</i>) or <i>INP</i> (<i>Incomplete</i>)

Update and Maintain Proposal Resource Types

ROLE: AGENCY GRANTS MAINTAINER

PATH: Set Up Financials/Supply Chain > Product Related > Grants > Proposal Resource Types

Here you can find existing Proposal Resource Types



Proposal Resource Types
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

SetID:

Resource Type:

☐ Include History

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

Search Results
View All First 1-9 of 9 Last

SetID	Resource Type	Description
SOKID ANIMA	Animal	Animal
SOKID CLINI	Clinical	Clinical
SOKID COMPU	Computer	Computer
SOKID LABOR	Laboratory	Laboratory
SOKID MAJOR	Major Equipment	Major Equipment
SOKID OFFIC	Office	Office
SOKID OTHER	Other	Other
SOKID RESOU	Other Resources	NSF
SOKID TEST1	Test Resource Type	Test Resource Type

The **Proposal Resource Types** page is used to define and maintain resource types that can be associated with proposals in the Grants module. Resource types are used to describe the institutional resources, such as facilities and equipment, which are proposed for use on a sponsored project. The FMS Project/Grants Team has provided the initial list of proposal resource types. All agencies will use a common list of Proposal Resource Types; therefore, when adding new values to this table, agencies will use the statewide SetID of SOKID. Agencies will maintain Proposal Resource Types after implementation. Since this is a shared table, please be cautious about updating existing values that may be used by other agencies.

Maintaining Grants – Set-Up Values Job Aid

You may add additional Resource Types using the Statewide SetID of SOKID



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 - Institution Types
 - Milestone Statuses
 - Milestone Types/Codes
 - Proposal Components
 - Proposal Resource Types

Proposal Resource Types

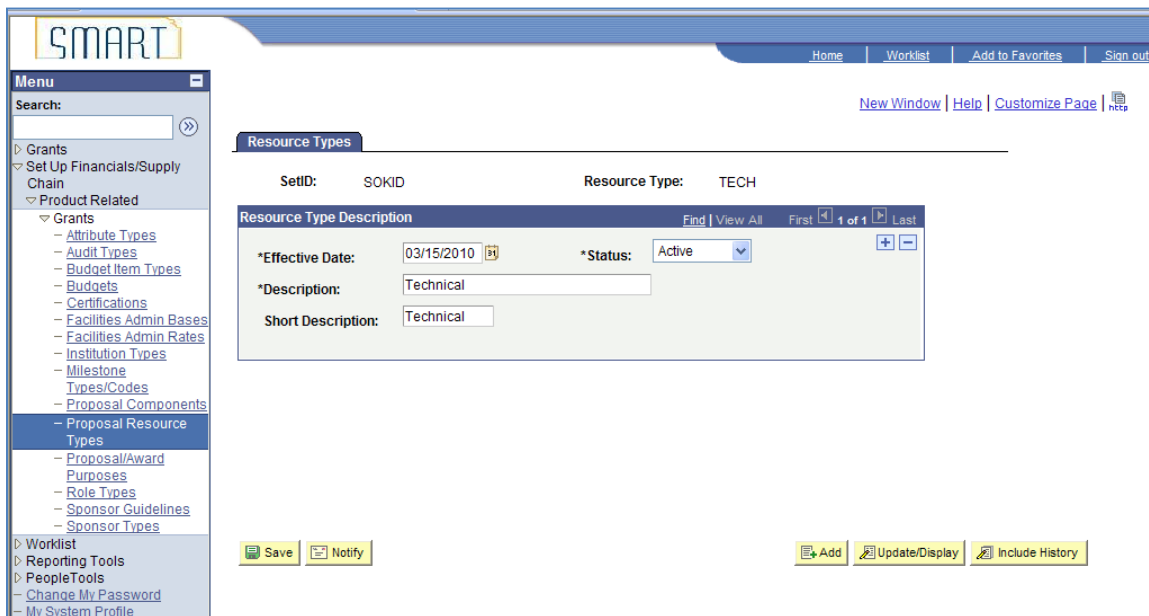
[Find an Existing Value](#) [Add a New Value](#)

SetID:


Resource Type:

[Find an Existing Value](#) [Add a New Value](#)

Field Name	Description
SetID	Use the statewide SetID of SOKID
Resource Type	Enter the Resource Type as defined by your agency



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Resource Types

SetID: SOKID Resource Type: TECH

Resource Type Description Find | View All First 1 of 1 Last

*Effective Date: *Status:

*Description:

Short Description:

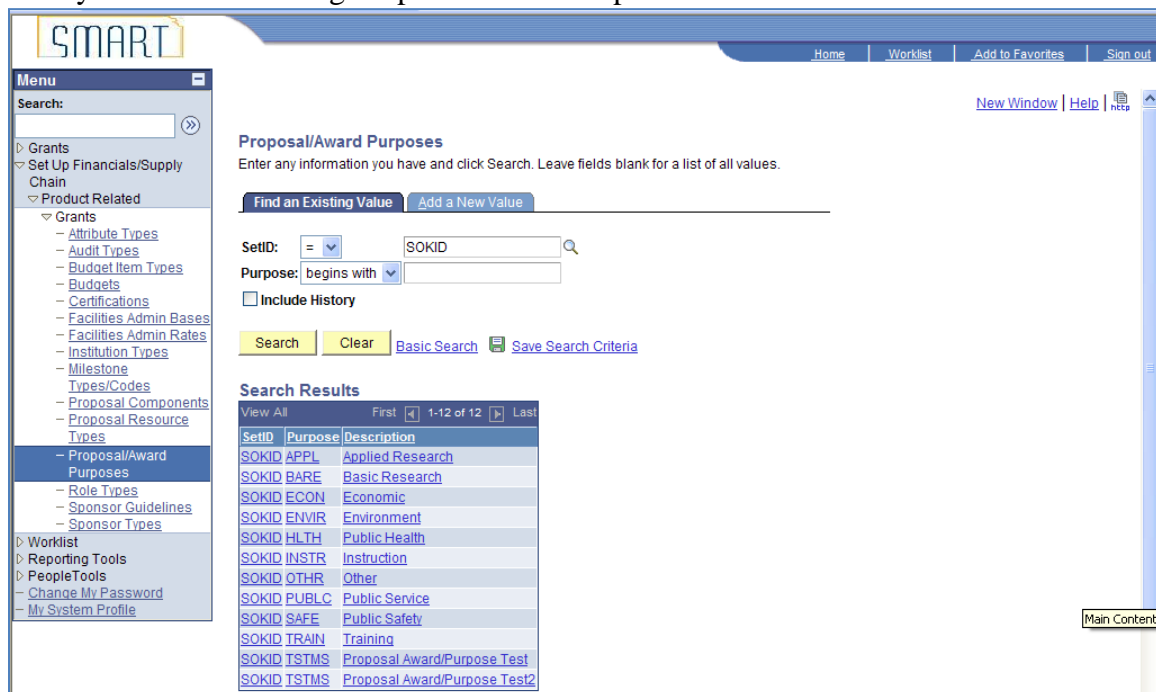
Field Name	Description
Effective Date	Use the Effective Date of the current date for newly created values. If updating an existing value use the appropriate date the change should be effective upon.
Status	Use the available statuses of Active or Inactive
Description	Provide a description of the Resource Type
Short Description	Provide a short description of the Resource Type

Update and Maintain Proposal/Award Purposes

ROLE: AGENCY GRANTS MAINTAINER

PATH: Set Up Financials/Supply Chain > Product Related > Grants > Proposal/Award Purposes

Here you can find existing Proposal/Award Purposes



Proposal/Award Purposes
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

SetID:

Purpose: begins with

☐ Include History


[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

Search Results
View All First 1-12 of 12 Last

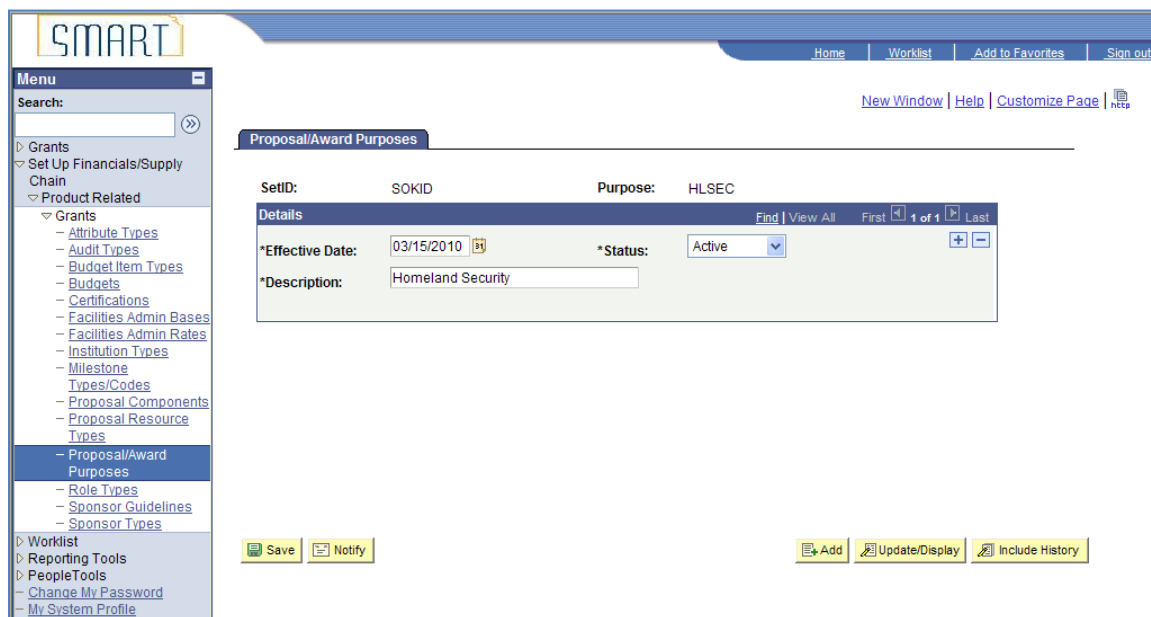
SetID	Purpose	Description
SOKID APPL	Applied Research	
SOKID BARE	Basic Research	
SOKID ECON	Economic	
SOKID ENVIR	Environment	
SOKID HLTH	Public Health	
SOKID INSTR	Instruction	
SOKID OTHER	Other	
SOKID PUBLI	Public Service	
SOKID SAFE	Public Safety	
SOKID TRAIN	Training	
SOKID TSTMS	Proposal Award/Purpose Test	
SOKID TSTMS	Proposal Award/Purpose Test2	

The **Proposal/Award Purposes** page identifies the purpose of the proposal being submitted (pre-award), or award being received (post-award). The FMS Projects/Grants Team has provided the initial list of purpose codes. All agencies will use a common list of Purposes; therefore, when adding new values to this table, agencies will use the statewide SetID of SOKID. Agencies will maintain Purposes after implementation. Since this is a shared table, please be cautious about updating existing values that may be used by other agencies.

You may add additional Proposal/Award Purposes using the Statewide SetID of SOKID



Field Name	Description
SetID	Use the statewide SetID of SOKID
Purpose	Enter the Purpose as defined by your agency



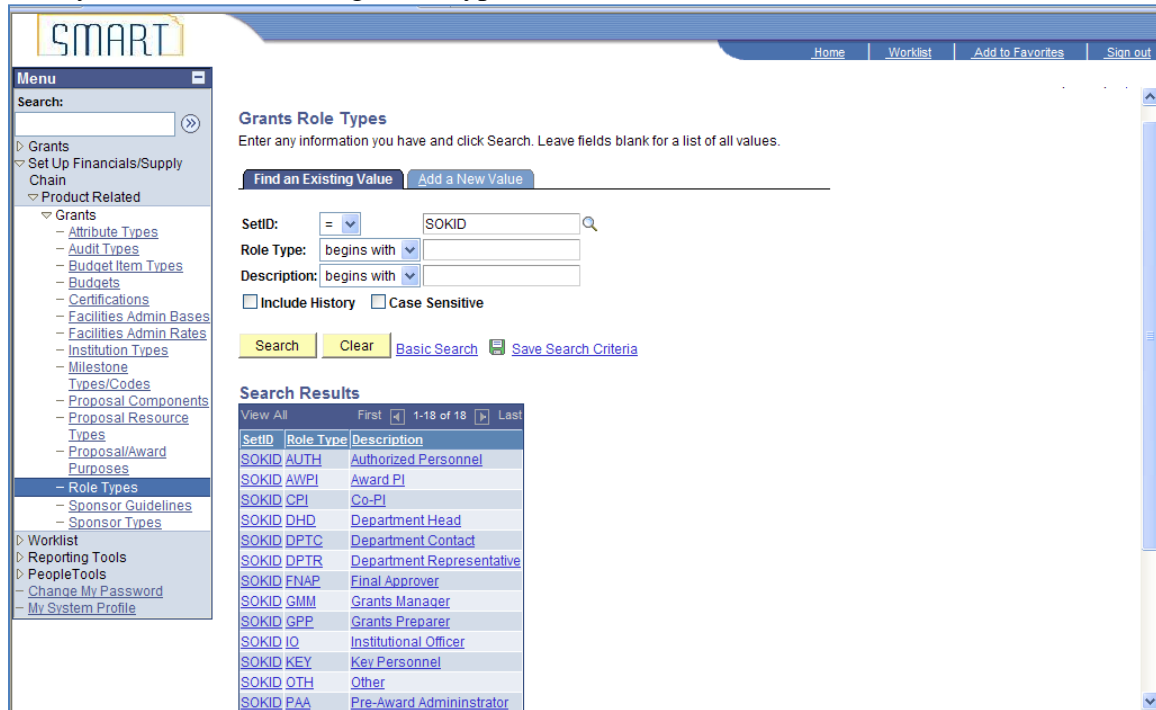
Field Name	Description
Effective Date	Use the Effective Date of the current date for newly created values. If updating an existing value use the appropriate date the change should be effective upon.
Status	Use the available statuses of Active or Inactive
Description	Provide a description of the Proposal/Award Purpose

Update and Maintain Role Types

ROLE: AGENCY GRANTS MAINTAINER

PATH: Set Up Financials/Supply Chain > Product Related > Grants > Role Types

Here you can select existing Role Types



Grants Role Types
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

SetID:

Role Type:

Description:

☐ Include History ☐ Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

Search Results

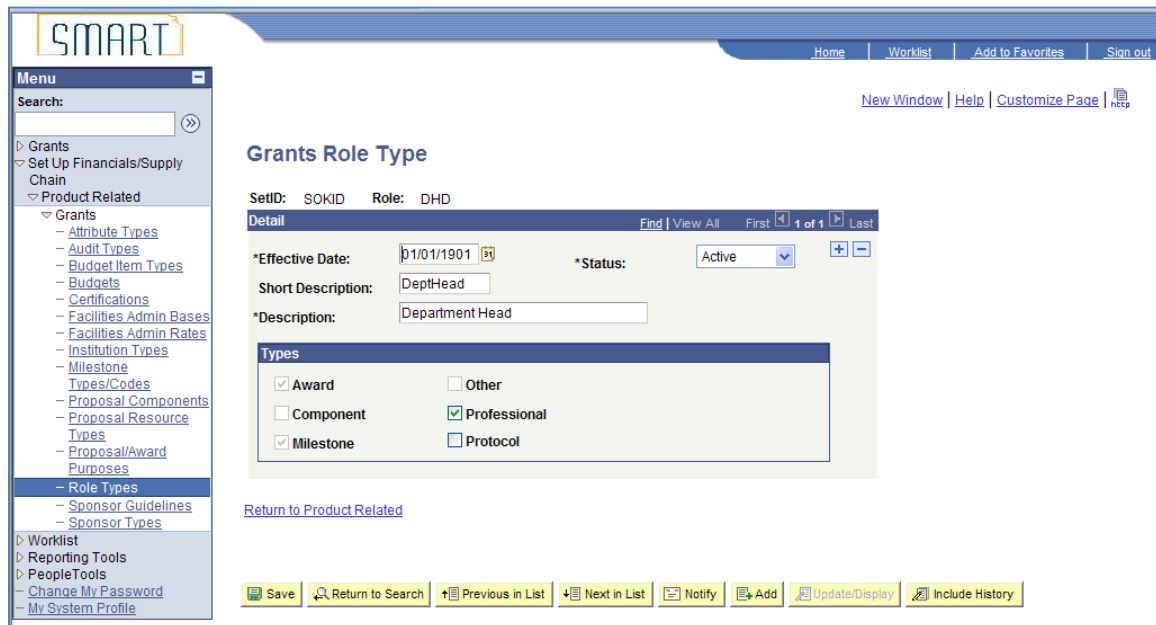
SetID	Role Type	Description
SOKID AUTH	AUTH	Authorized Personnel
SOKID AWPI	AWPI	Award PI
SOKID CPI	CPI	Co-PI
SOKID DHD	DHD	Department Head
SOKID DPTC	DPTC	Department Contact
SOKID DPTR	DPTR	Department Representative
SOKID ENAP	ENAP	Final Approver
SOKID GMM	GMM	Grants Manager
SOKID GPP	GPP	Grants Preparer
SOKID IO	IO	Institutional Officer
SOKID KEY	KEY	Key Personnel
SOKID QTH	QTH	Other
SOKID PAA	PAA	Pre-Award Administrator

The **Role Types** page in the Grants module is used to define a particular role on a grant, which can then be assigned to a specific person who works with that grant proposal. Role types are used to establish grant workflow notifications. Workflow can be used to obtain internal approvals for grant proposal submissions and inform grant team members of proposal status changes. The FMS Projects/Grants Team has provided the initial list of role types. Agencies will maintain role types after implementation. All agencies will use a common list of role types. Since this is a shared table, please be cautious about updating existing values that may be used by other agencies.

When you add a role type you must use the Statewide SetID of SOKID



Field Name	Description
SetID	Use the statewide SetID of SOKID
Role Type	Enter the Role Type as defined by your agency



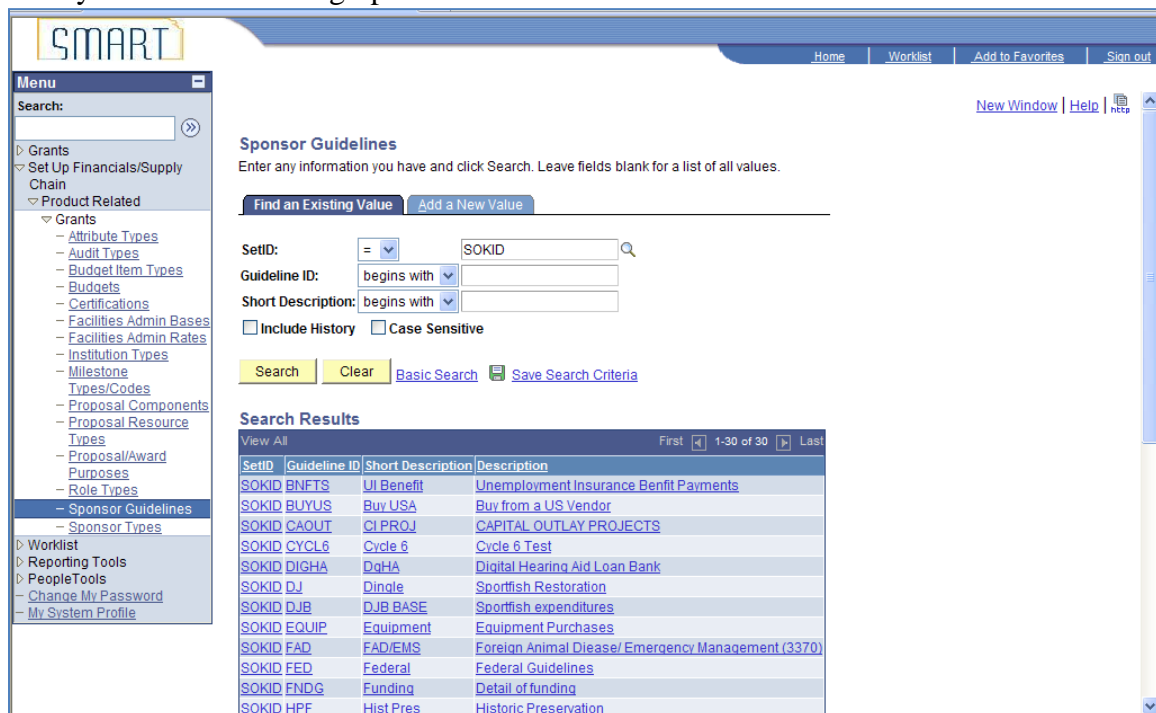
Field Name	Description
Effective Date	Use the Effective Date of the current date for newly created values. If updating an existing value use the appropriate date the change should be effective upon.
Status	Use the available statuses of Active or Inactive
Short Description	Provide a short description of the Role Type
Description	Provide a description of the Role Type
Types	Check the Professional box to make the role eligible for use on proposals

Update and Maintain Sponsor Guidelines

ROLE: AGENCY GRANTS MAINTAINER

PATH: Set Up Financials/Supply Chain > Product Related > Grants > Sponsor Guidelines

Here you can find existing Sponsor Guidelines



Sponsor Guidelines
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

SetID:

Guideline ID:

Short Description:

☐ Include History ☐ Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

Search Results

View All First Last

SetID	Guideline ID	Short Description	Description
SOKID	BNFTS	UI Benefit	Unemployment Insurance Benefit Payments
SOKID	BUYUS	Buy USA	Buy from a US Vendor
SOKID	CAOUT	CI PROJ	CAPITAL OUTLAY PROJECTS
SOKID	CYCL6	Cycle 6	Cycle 6 Test
SOKID	DIGHA	DqHA	Digital Hearing Aid Loan Bank
SOKID	DJ	Dingle	Sportfish Restoration
SOKID	DJB	DJB BASE	Sportfish expenditures
SOKID	EQUIP	Equipment	Equipment Purchases
SOKID	FAD	FAD/EMS	Foreign Animal Disease/Emergency Management (3370)
SOKID	FED	Federal	Federal Guidelines
SOKID	FNDG	Funding	Detail of funding
SOKID	HPF	Hist Pres	Historic Preservation

The **Sponsor Guidelines** page establishes the various types of guideline codes that can be associated with a specific sponsor in the Grants module. These guidelines identify the restrictions a sponsor sets for its grantees. The FMS Projects/Grants Team has worked with agencies to define and setup the initial list of guidelines. All agencies will use a common list of Sponsor Guidelines; therefore, when adding new values to this table, agencies will use the statewide SetID of SOKID. Agencies will maintain Sponsor Guidelines after implementation. Since this is a shared table, please be cautious about updating existing values that may be used by other agencies.

Maintaining Grants – Set-Up Values Job Aid

You may add additional Sponsor Guidelines using the Statewide SetID of SOKID



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 - Proposal Components
 - Proposal Resource Types
 - Proposal/Award Purposes
 - Role Types
 - Sponsor Guidelines

Sponsor Guidelines

Find an Existing Value | Add a New Value

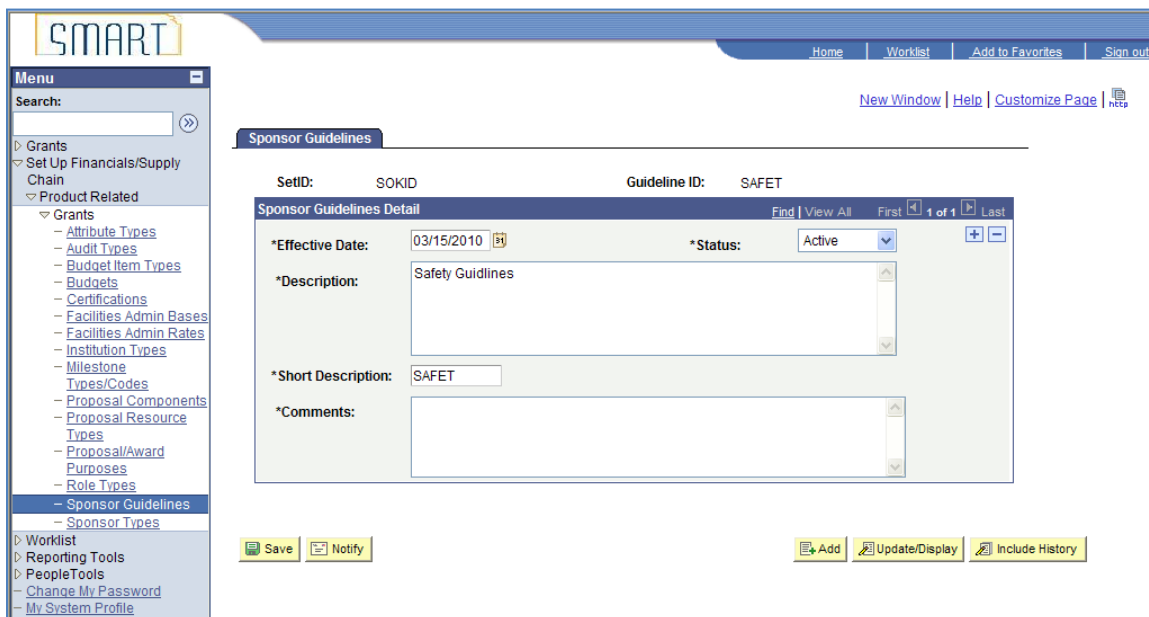
SetID: SOKID

Guideline ID: []

Add

Find an Existing Value | Add a New Value

Field Name	Description
SetID	Use the statewide SetID of SOKID
Guideline ID	Enter the Guideline ID as defined by your agency



SMART Home Worklist Add to Favorites Sign out

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Sponsor Guidelines

SetID: SOKID Guideline ID: SAFET

Sponsor Guidelines Detail Find | View All First 1 of 1 Last

*Effective Date: 03/15/2010 *Status: Active

*Description: Safety Guidelines

*Short Description: SAFET

*Comments:

Save Notify Add Update/Display Include History

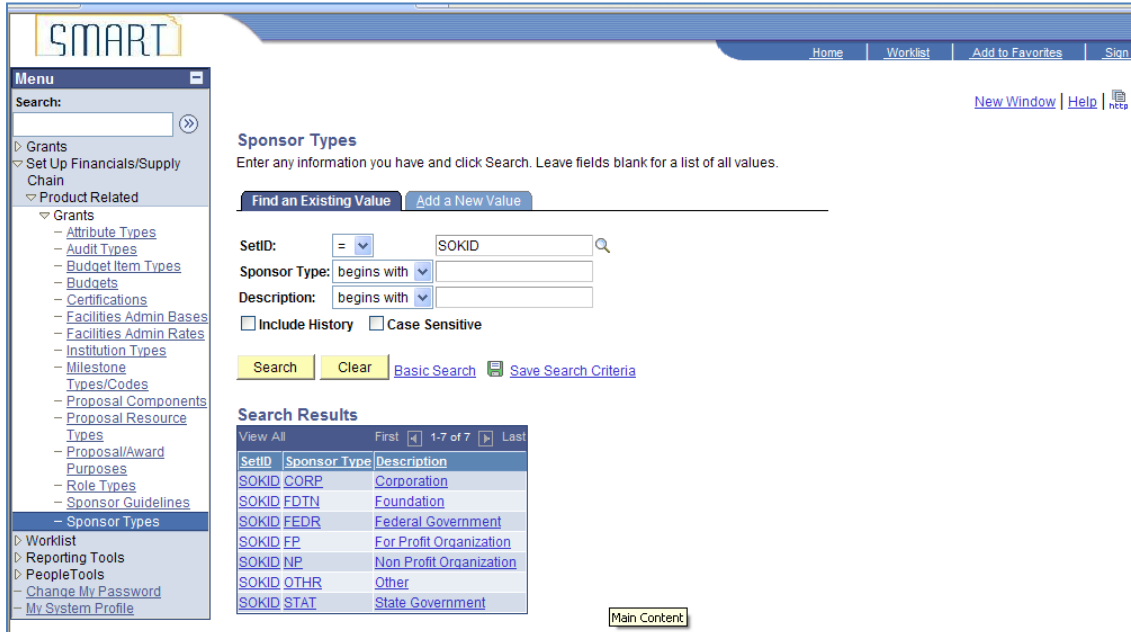
Field Name	Description
Effective Date	Use the Effective Date of the current date for newly created values. If updating an existing value use the appropriate date the change should be effective upon.
Status	Use the available statuses of Active or Inactive
Description	Provide a description of the Sponsor Guideline
Short Description	Provide a short description of the Sponsor Guideline
Comments	Provide specific comments regarding the Sponsor Guideline

Update and Maintain Sponsor Types

ROLE: AGENCY GRANTS MAINTAINER

PATH: Set Up Financials/Supply Chain > Product Related > Grants > Sponsor Types

Here you can find an existing Sponsor Type



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 - Proposal/Award Purposes
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 - Sponsor Types**
- Worklist
- Reporting Tools
- PeopleTools
 - Change My Password
 - My System Profile

Sponsor Types

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

SetID: SOKID

Sponsor Type: begins with

Description: begins with

☐ Include History ☐ Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

Search Results

View All First 1-7 of 7 Last

SetID	Sponsor Type	Description
SOKID CORP	Corporation	
SOKID FDTN	Foundation	
SOKID FEDR	Federal Government	
SOKID FP	For Profit Organization	
SOKID NP	Non Profit Organization	
SOKID QTHR	Other	
SOKID STAT	State Government	

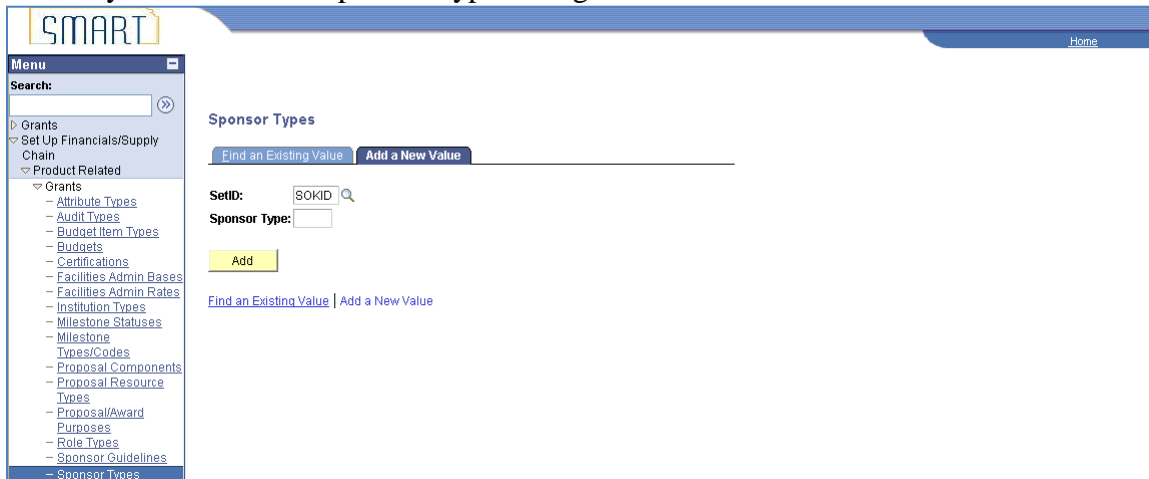
[Main Content](#)

The **Sponsor Types** page defines the types of sponsors with which the institution has relationships. The FMS Projects/Grants Team has provided the initial list of sponsor types. All agencies will use a common list of Sponsor Types; therefore, when adding new values to this table, agencies will use the statewide SetID of SOKID. Agencies will maintain Sponsor Types after implementation. Since this is a shared table, please be cautious about updating existing values that may be used by other agencies.

Maintaining Grants – Set-Up Values Job Aid

Statewide Management, Accounting and Reporting Tool

You may add additional Sponsor Types using the Statewide SetID of SOKID



SMART

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Milestone Types/Codes

Proposal Components

Proposal Resource Types

Proposal/Award Purposes

Role Types

Sponsor Guidelines

Sponsor Types

Sponsor Types

Find an Existing Value Add a New Value

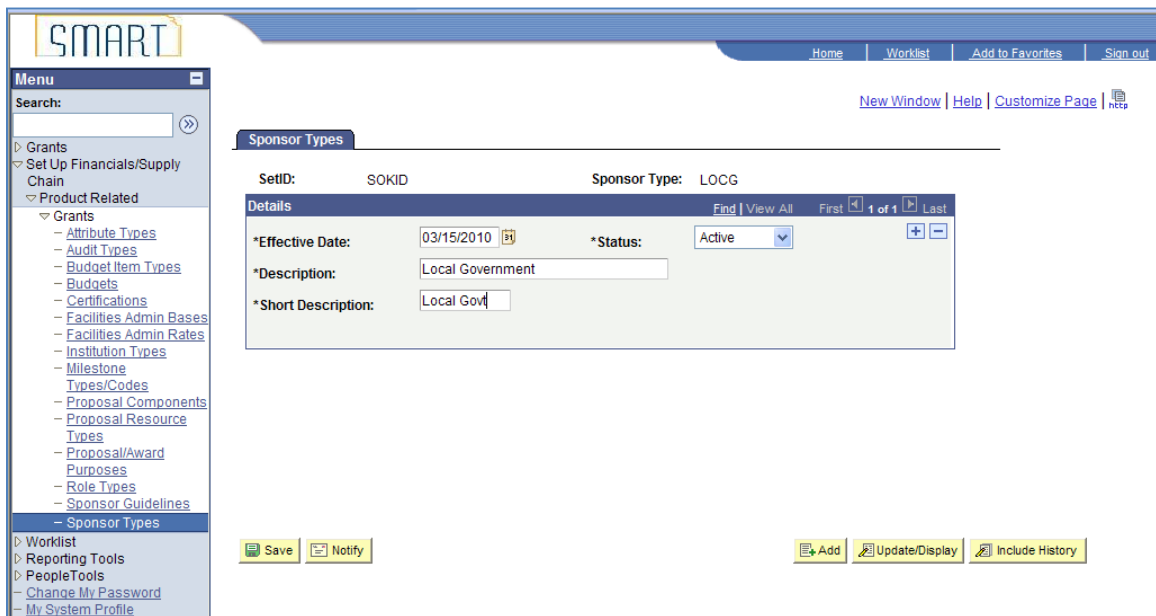
SetID: SOKID

Sponsor Type:

Add

Find an Existing Value Add a New Value

Field Name	Description
SetID	Use the statewide SetID of SOKID
Sponsor Type	Enter the Sponsor Type as defined by your agency



SMART

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Sponsor Types

SetID: SOKID Sponsor Type: LOCG

Details

Find View All First 1 of 1 Last

*Effective Date: 03/15/2010

*Status: Active

*Description: Local Government

*Short Description: Local Gov

Save Notify

Add Update/Display Include History

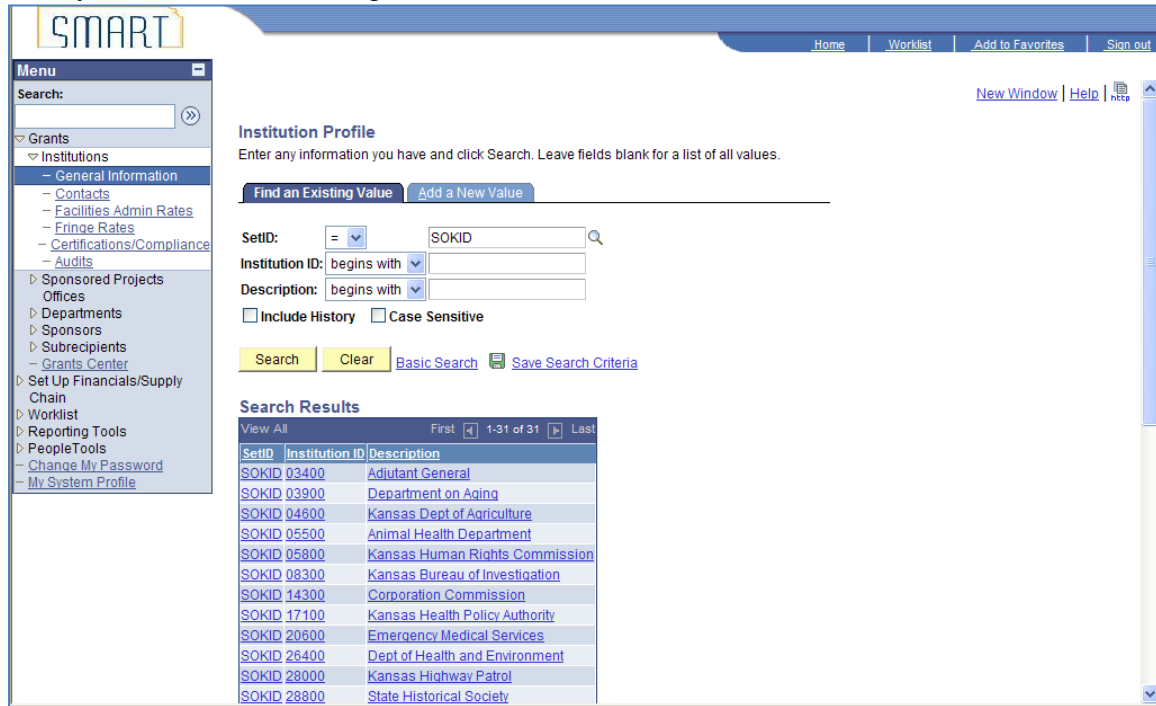
Field Name	Description
Effective Date	Use the Effective Date of the current date for newly created values. If updating an existing value use the appropriate date the change should be effective upon.
Status	Use the available statuses of Active or Inactive
Description	Provide a description of the Sponsor Guideline
Short Description	Provide a short description of the Sponsor Guideline

Update and Maintain Institution General Information

ROLE: AGENCY GRANTS MAINTAINER

PATH: Grants > Institutions > General Information

Here you can find an existing Institution General Information



SMART Statewide Management, Accounting and Reporting Tool

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 - Departments
 - Sponsors
 - Subrecipients
 - Grants Center
 - Set Up Financials/Supply Chain
 - Worklist
 - Reporting Tools
 - PeopleTools
 - Change My Password
 - My System Profile

Institution Profile

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

SetID:

Institution ID:

Description:

☐ Include History ☐ Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

Search Results

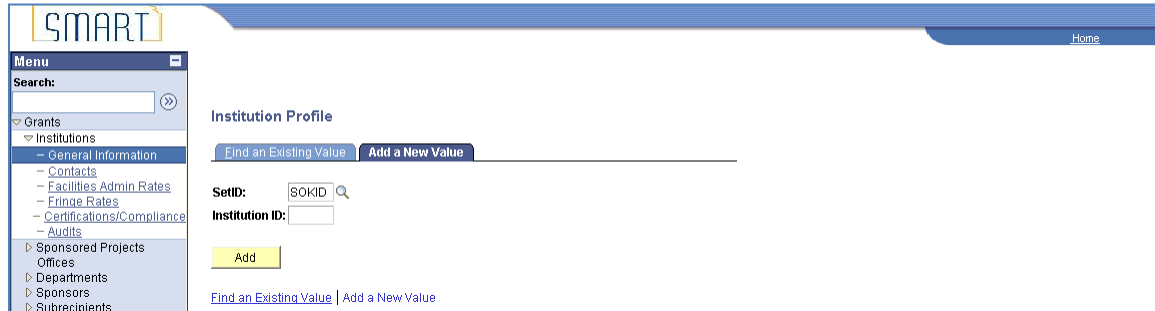
View All First 1-31 of 31 Last

SetID	Institution ID	Description
SOKID 03400		Adjutant General
SOKID 03900		Department on Aging
SOKID 04600		Kansas Dept of Agriculture
SOKID 05500		Animal Health Department
SOKID 05800		Kansas Human Rights Commission
SOKID 08300		Kansas Bureau of Investigation
SOKID 14300		Corporation Commission
SOKID 17100		Kansas Health Policy Authority
SOKID 20600		Emergency Medical Services
SOKID 26400		Dept of Health and Environment
SOKID 28000		Kansas Highway Patrol
SOKID 28800		State Historical Society

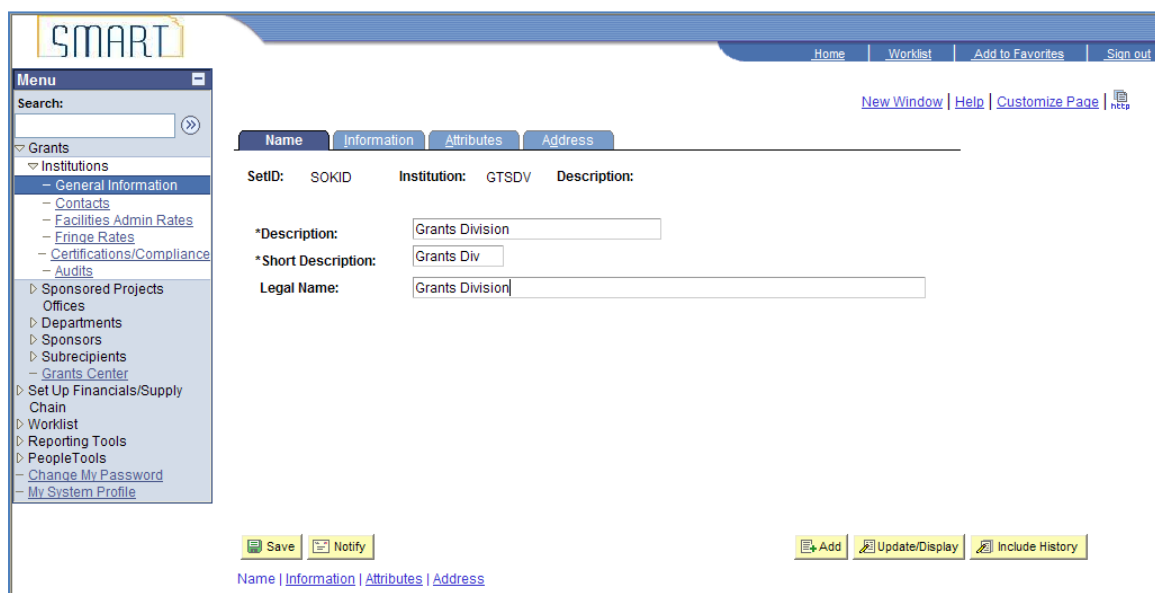
The **Institution Profile** in the Grants module is the organization which is administering the grant. Grants uses the institutional information that you enter on the Institution general information page to populate sponsor proposal forms (pre-award) and financial status reports (post-award). The FMS Projects/Grants Team has setup the initial values for institutions. Each agency will have one institution.

All agencies will use a common list of Institutions; therefore, when adding new values to this table, agencies will use the statewide SetID of SOKID. Agencies will maintain Institutions after implementation. Since this is a shared table, please be cautious about updating existing values that may be used by other agencies.

You may add additional Institution General Information using the Statewide SetID of SOKID



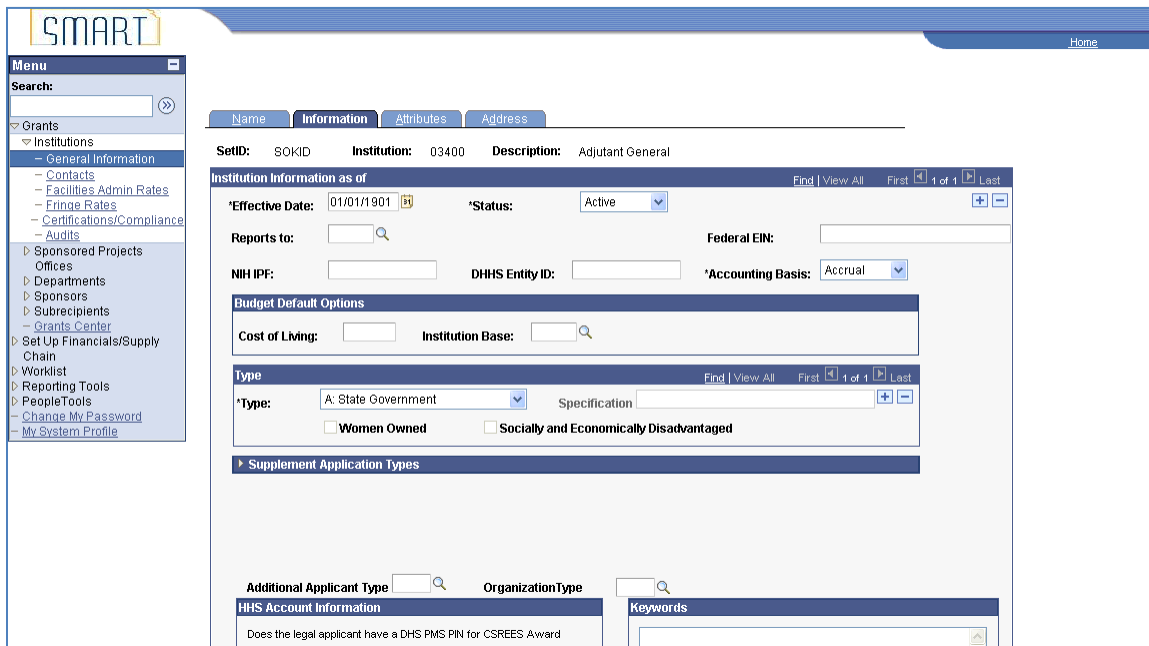
Field Name	Description
SetID	Use the statewide SetID of SOKID
Institution ID	Enter the Institution ID as defined by your agency



Field Name	Description
Description	Provide a description of the Institution
Short Description	Provide a short description of the Institution
Legal Name	Enter the Legal Name of the Institution

Maintaining Grants – Set-Up Values Job Aid

Statewide Management, Accounting and Reporting Tool

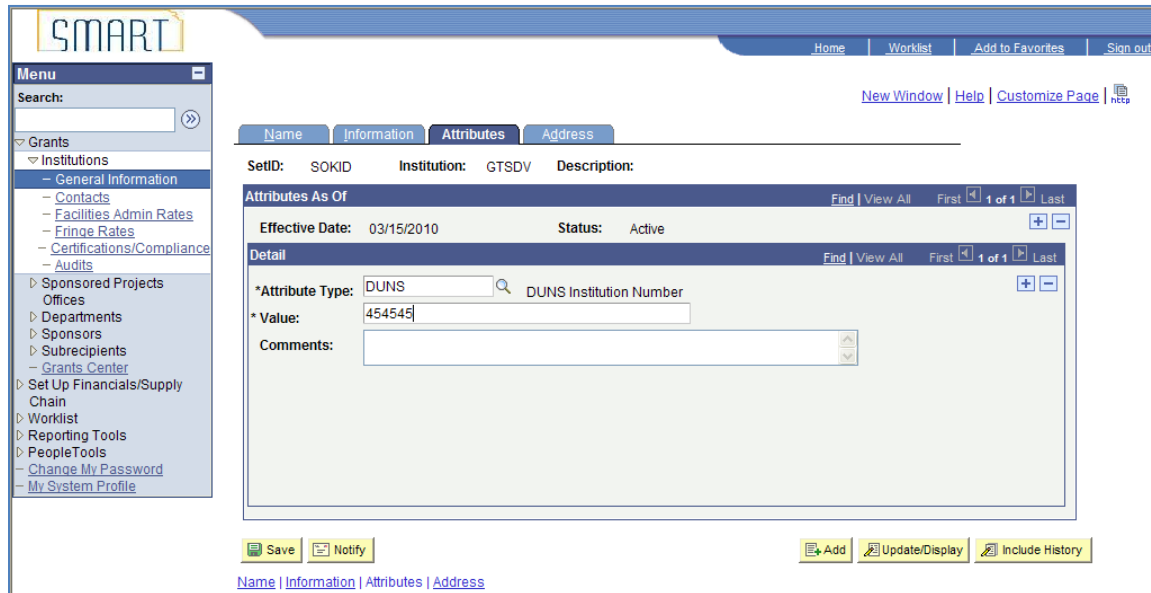


The screenshot shows the SMART web application interface. On the left is a 'Menu' sidebar with options like Grants, Institutions, Sponsored Projects, etc. The main content area is titled 'Set-Up Values' and displays information for a specific grant (SetID: SOKID, Institution: 03400, Description: Adjutant General). It includes sections for 'Institution Information as of', 'Budget Default Options', 'Type', and 'Supplement Application Types'. Fields for 'Effective Date', 'Status', 'Accounting Basis', and 'Type' are visible, along with search and navigation controls.

Field Name	Description
Effective Date	Use the Effective Date of the current date for newly created values. If updating an existing value use the appropriate date the change should be effective upon.
Status	Use the available statuses of Active or Inactive
Accounting Basis	Select an Accounting Basis. Default is set to <i>Accrual</i>
Type	Select an Institution Type
Remaining Fields	Enter additional institutional information if desired (Optional)

Maintaining Grants – Set-Up Values Job Aid

Statewide Management, Accounting and Reporting Tool



The screenshot shows the SMART web application interface. On the left is a 'Menu' sidebar with a search bar and a tree view containing categories like 'Grants', 'Institutions', 'Sponsored Projects', etc. The main content area has tabs for 'Name', 'Information', 'Attributes', and 'Address'. The 'Attributes' tab is active, showing fields for 'SetID: SOKID', 'Institution: GTSDV', and 'Description:'. Below these are 'Attributes As Of' and 'Detail' sections. The 'Detail' section includes a dropdown for '*Attribute Type:' (set to 'DUNS'), a text input for '*Value:' (containing '454545'), and a 'Comments:' text area. At the bottom are buttons for 'Save', 'Notify', 'Add', 'Update/Display', and 'Include History'.

Field Name	Description
Attribute Type	Select an attribute type associated with the Institution
Value	Enter the value of the Attribute Type selected
Comments	Enter any comments regarding the attribute

Menu

Search:

- Grants
- Institutions
 - General Information
 - Contacts
 - Facilities Admin Rates
 - Fringe Rates
 - Certifications/Compliance
 - Audits
 - Sponsored Projects
 - Departments
 - Sponsors
 - Subrecipients
 - Grants Center
- Set Up Financials/Supply Chain
- Worklist
- Reporting Tools
- PeopleTools
 - Change My Password
 - My System Profile

Home | Worklist | Add to Favorites | Sign out

[New Window](#) | [Help](#) | [Customize Page](#) | [Help](#)

SMART

Name | **Information** | **Attributes** | **Address**

SetID: SOKID Institution: GTSDV Description:

Institution Address as of Find | View All | First 1 of 1 | Last

Effective Date: 03/15/2010 Status: Active

Address Information Find | View All | First 1 of 1 | Last

*Location: Civil Air Patrol [Additional Info](#)

☐ Proposal Location ☐ Billing Location ☐ Award Location

Phone

Prefix: 785 Telephone: 825-0009 Ext:

Fax:

Mailing Address

Address 1: Civil Air Patrol	Building #:	
City: Salina	Floor #:	
County: Saline	Sector:	
State: KS Kansas	Postal: 67401	
Country: USA United States	Jurisdiction:	

[Save](#) [Notify](#)

[Add](#) [Update/Display](#) [Include History](#)

[Name](#) | [Information](#) | [Attributes](#) | [Address](#)

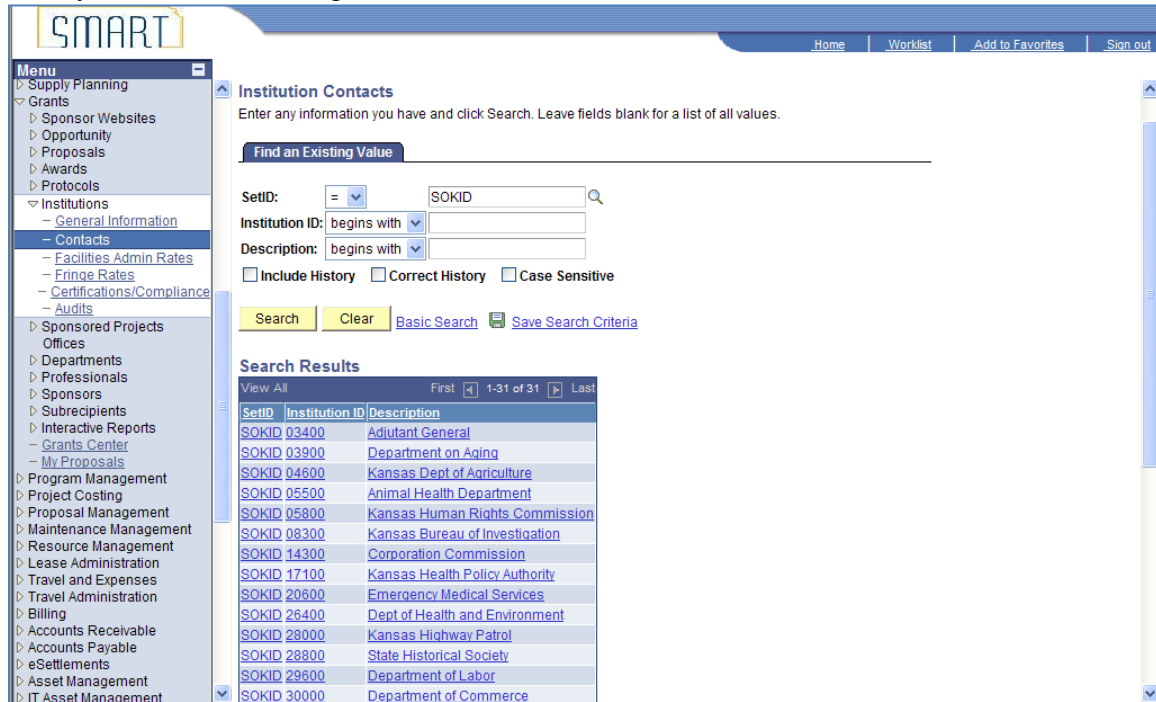
Field Name	Description
Location	Select a location code for the institution
Proposal Location	Check if the Location provided is the Proposal Location
Billing Location	Check if the Location provided is the Billing Location
Award Location	Check if the Location provided is the Award Location

Update and Maintain Institution Contacts

ROLE: AGENCY GRANTS MAINTAINER

PATH: Grants > Institutions > Contacts

Here you can find existing Institution Contacts



SMART Statewide Management, Accounting and Reporting Tool

Home | Worklist | Add to Favorites | Sign out

Menu

- Supply Planning
- Grants
 - Sponsor Websites
 - Opportunity
 - Proposals
 - Awards
 - Protocols
- Institutions
 - General Information
 - Contacts**
 - Facilities Admin Rates
 - Fringe Rates
 - Certifications/Compliance
 - Audits
- Sponsored Projects
- Offices
- Departments
- Professionals
- Sponsors
- Subrecipients
- Interactive Reports
- Grants Center
- My Proposals
- Program Management
- Project Costing
- Proposal Management
- Maintenance Management
- Resource Management
- Lease Administration
- Travel and Expenses
- Travel Administration
- Billing
- Accounts Receivable
- Accounts Payable
- eSettlements
- Asset Management
- IT Asset Management

Institution Contacts

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

SetID: = SOKID

Institution ID: begins with

Description: begins with

☐ Include History ☐ Correct History ☐ Case Sensitive

Search **Clear** [Basic Search](#) [Save Search Criteria](#)

Search Results

View All First 1-31 of 31 Last

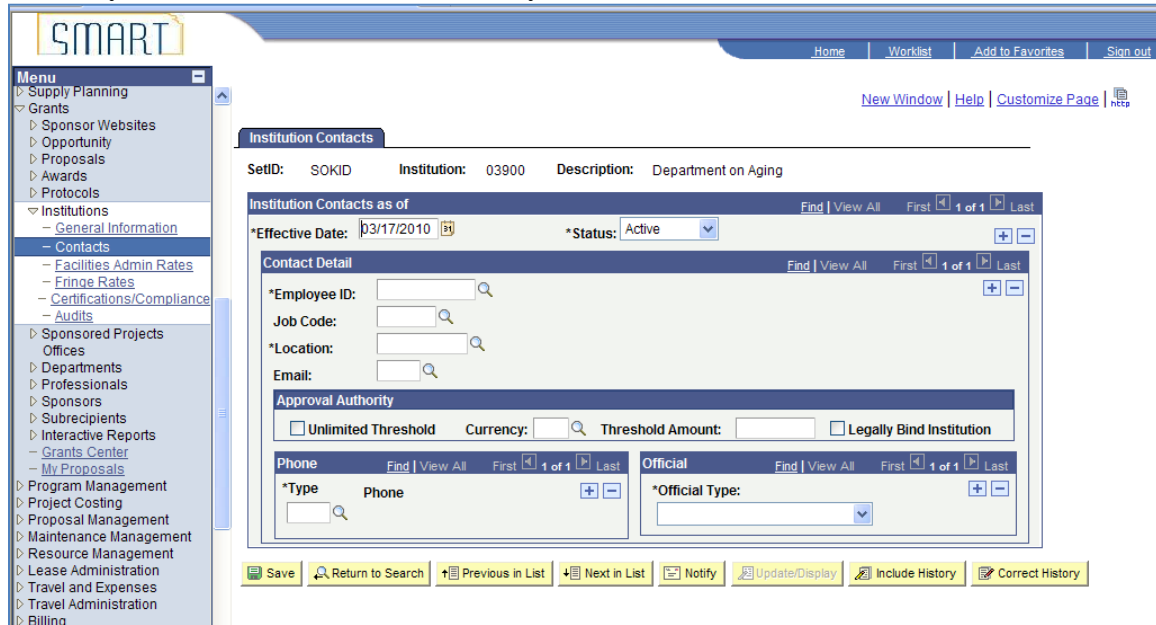
SetID	Institution ID	Description
SOKID 03400		Adjutant General
SOKID 03900		Department on Aging
SOKID 04600		Kansas Dept of Agriculture
SOKID 05500		Animal Health Department
SOKID 05800		Kansas Human Rights Commission
SOKID 08300		Kansas Bureau of Investigation
SOKID 14300		Corporation Commission
SOKID 17100		Kansas Health Policy Authority
SOKID 20600		Emergency Medical Services
SOKID 26400		Dept of Health and Environment
SOKID 28000		Kansas Highway Patrol
SOKID 28800		State Historical Society
SOKID 29600		Department of Labor
SOKID 30000		Department of Commerce

The **Institution Contacts** page establishes individuals who are designated as “contacts,” or authorized officials, in the grants process and identifies their location, contact information and approval authority for workflow. There can be more than one contact for any given institution. The FMS Projects/Grants Team has worked with agencies to identify contact persons by institution and their threshold authority and has performed the initial configuration to include this contact information. Agencies will be able to maintain institution contacts after implementation. Institution Contacts will be setup under the Statewide SETID of SOKID. Since this is a shared table, please be cautious about updating existing values that may be used by other agencies.

Maintaining Grants – Set-Up Values Job Aid

Statewide Management, Accounting and Reporting Tool

You may add additional information for your Institution Contacts



The screenshot shows the SMART web application interface. On the left is a 'Menu' sidebar with categories like Supply Planning, Grants, Institution Management, and Program Management. The main content area is titled 'Institution Contacts'. It displays a form for adding or editing contact information. The form includes fields for SetID (SOKID), Institution (03900), and Description (Department on Aging). Below these are sections for 'Institution Contacts as of', 'Contact Detail', 'Approval Authority', 'Phone', and 'Official'. Each section contains specific input fields and checkboxes. At the bottom of the form are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', 'Update/Display', 'Include History', and 'Correct History'.

Field Name	Description
Effective Date	Use the Effective Date of the current date for newly created values. If updating an existing value use the appropriate date the change should be effective upon.
Status	Use the available statuses of Active or Inactive
Employee ID	Select the Employee ID of the Contact
Job Code	Select the Job Code associated with the Contact
Location	Select the location of the contact
Approval Authority Section	Select any criteria that may apply to the contact
Phone Section	Select the phone Type. The phone number is configured outside this page
Official Section	Select an Official Type for the contact, if applicable

Update and Maintain Institution Facilities Admin Rates

ROLE: AGENCY GRANTS MAINTAINER

PATH: Grants > Institutions > Facilities Admin Rates

Here you can find existing Institution Facilities Admin Rates



SMART Statewide Management, Accounting and Reporting Tool

Home | Worklist | Add to Favorites | Sign out

Menu

- Institutions
 - General Information
 - Contacts
 - Facilities Admin Rates**
 - Fringe Rates
 - Certifications/Compliance
 - Audits
- Sponsored Projects
- Offices
- Departments
- Professionals
- Sponsors
- Subrecipients
- Interactive Reports
- Grants Center
- My Proposals
- Program Management
- Project Costing
- Proposal Management
- Maintenance Management
- Resource Management
- Lease Administration
- Travel and Expenses
- Travel Administration
- Billing
- Accounts Receivable
- Accounts Payable
- eSettlements
- Asset Management
- IT Asset Management
- Banking
- Cash Management
- Deal Management
- Risk Management
- Financial Gateway
- VAT and Intrastat
- Excise and Sales Tax/VAT

Institution F&A Rates

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search by: SetID = SOKID

☐ Include History ☐ Correct History

Search [Advanced Search](#)

Search Results

View All First 1-31 of 31 Last

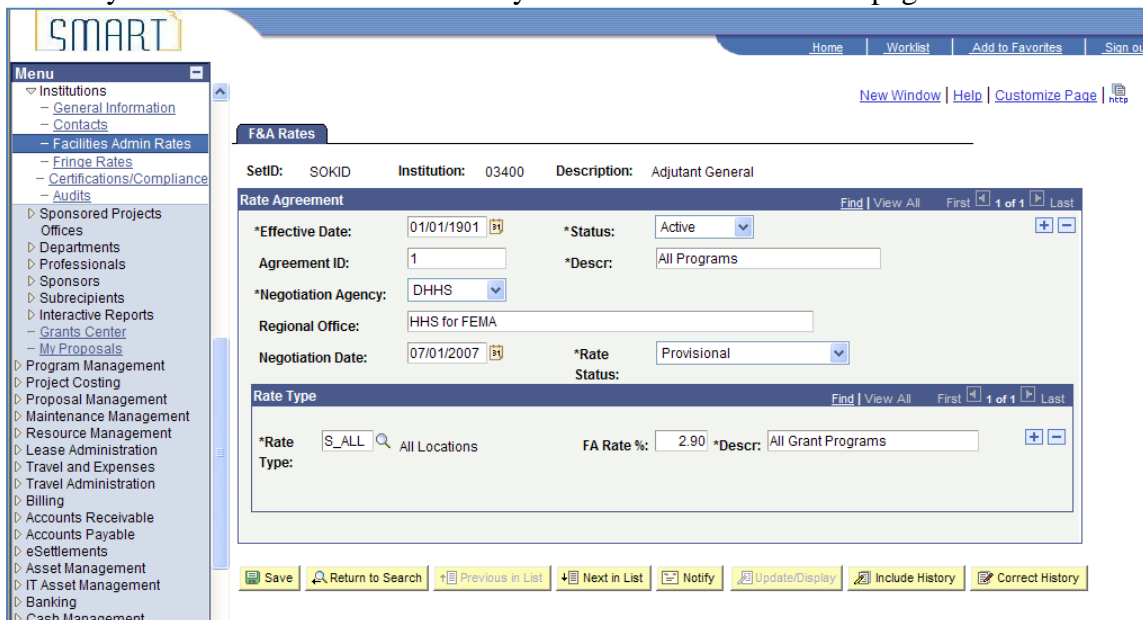
SetID	Institution ID	Description
SOKID	03400	Adjutant General
SOKID	03900	Department on Aging
SOKID	04600	Kansas Dept of Agriculture
SOKID	05500	Animal Health Department
SOKID	05800	Kansas Human Rights Commission
SOKID	08300	Kansas Bureau of Investigation
SOKID	14300	Corporation Commission
SOKID	17100	Kansas Health Policy Authority
SOKID	20600	Emergency Medical Services
SOKID	26400	Dept of Health and Environment
SOKID	28000	Kansas Highway Patrol
SOKID	28800	State Historical Society
SOKID	29600	Department of Labor
SOKID	30000	Department of Commerce
SOKID	35000	Juvenile Justice Authority
SOKID	35200	Ks Juvenile Correctional Cmplx

The **Institution Facilities Admin Rates** page defines the appropriate facilities & administrative (F&A) rate, also known as indirect costs or overhead, to be charged on an institution's sponsored projects. F&A costs are those administrative costs that are necessary to conduct grant activities. F&A rates are generally percentages negotiated between an institution and its federal cognizant agency, which represent reasonable rates of overhead an institution can claim as eligible costs to a grant or project. The FMS Projects/Grants Team has worked with the state agencies to identify institution F&A rates and has performed the initial configuration to include these institution F&A rates. Agencies will be able to maintain institution F&A rates after implementation. Institution F&A rates will be setup under the Statewide SETID of SOKID. Since this is a shared table, please be cautious about updating existing values that may be used by other agencies.

Maintaining Grants – Set-Up Values Job Aid

Statewide Management, Accounting and Reporting Tool

You may add additional information to your Institution F&A Rates page



The screenshot shows the SMART F&A Rates page. The left sidebar contains a menu with categories like Institutions, Facilities Admin Rates, and Sponsored Projects. The main content area is titled 'F&A Rates' and displays details for a specific rate agreement. The 'Rate Agreement' section includes fields for Effective Date (01/01/1901), Agreement ID (1), Negotiation Agency (DHHS), Regional Office (HHS for FEMA), Negotiation Date (07/01/2007), Status (Active), and Description (All Programs). The 'Rate Type' section shows a Rate Type of S_ALL, FA Rate % of 2.90, and Description of All Grant Programs. At the bottom, there are buttons for Save, Return to Search, Previous in List, Next in List, Notify, Update/Display, Include History, and Correct History.

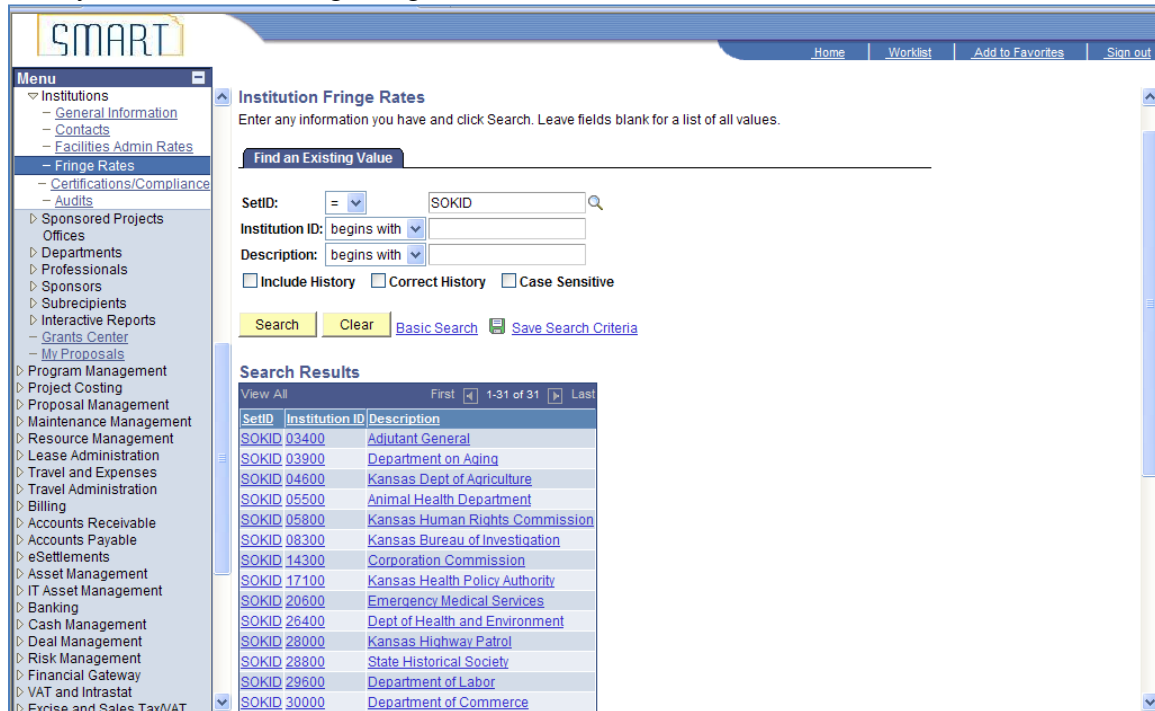
Field Name	Description
Effective Date	Use the Effective Date of the current date for newly created values. If updating an existing value use the appropriate date the change should be effective upon.
Status	Use the available statuses of Active or Inactive
Agreement ID	Enter the F&A agreement number, if applicable
Negotiation Agency	Select the federal agency with which you have negotiated for the rate you are defining
Regional Office	Enter the Regional Office of the Negotiation Agency, if applicable
Negotiation Date	Enter the Negotiation Date
Rate Status	Select a Rate Status. The available values are <i>Final</i> , <i>Fixed</i> , <i>Pre-determined</i> and <i>Provisional</i>
Rate Type	Select the Rate Type. Multiple Rate Types can entered
FA Rate %	Select the FA Rate % for the Rate Type
Descr	Enter a description for the FA Rate Type and Rate %

Update and Maintain Institution Fringe Rates

ROLE: AGENCY GRANTS MAINTAINER

PATH: Grants > Institutions > Fringe Rates

Here you can find existing Fringe Rates



SMART Statewide Management, Accounting and Reporting Tool

Home | Worklist | Add to Favorites | Sign out

Menu

- ▼ Institutions
 - General Information
 - Contacts
 - Facilities Admin Rates
 - Fringe Rates
 - Certifications/Compliance
 - Audits
- ▶ Sponsored Projects
 - Offices
 - Departments
 - Professionals
 - Sponsors
 - Subrecipients
 - Interactive Reports
 - Grants Center
 - My Proposals
- ▶ Program Management
 - Project Costing
 - Proposal Management
 - Maintenance Management
 - Resource Management
 - Lease Administration
 - Travel and Expenses
 - Travel Administration
 - Billing
 - Accounts Receivable
 - Accounts Payable
 - eSettlements
 - Asset Management
 - IT Asset Management
 - Banking
 - Cash Management
 - Deal Management
 - Risk Management
 - Financial Gateway
 - VAT and Intrastat
 - Fringe and Sales Tax/VAT

Institution Fringe Rates

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

SetID: = SOKID

Institution ID: begins with

Description: begins with

☐ Include History ☐ Correct History ☐ Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

Search Results

View All First 1-31 of 31 Last

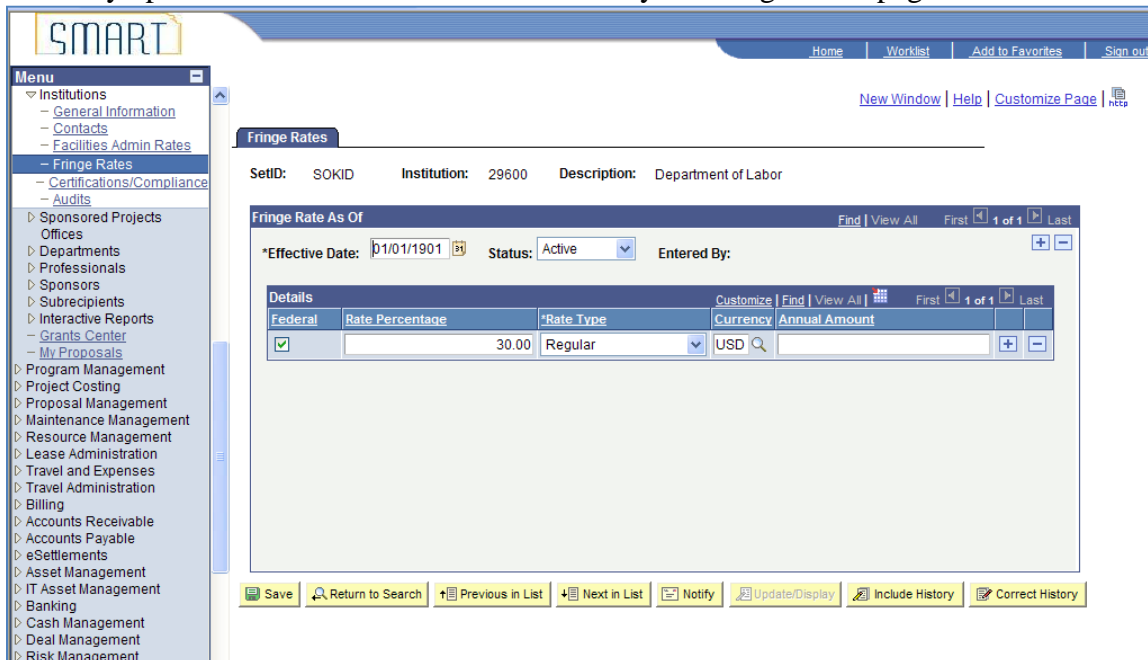
SetID	Institution ID	Description
SOKID 03400		Adjutant General
SOKID 03900		Department on Aging
SOKID 04600		Kansas Dept of Agriculture
SOKID 05500		Animal Health Department
SOKID 05800		Kansas Human Rights Commission
SOKID 08300		Kansas Bureau of Investigation
SOKID 14300		Corporation Commission
SOKID 17100		Kansas Health Policy Authority
SOKID 20600		Emergency Medical Services
SOKID 26400		Dept of Health and Environment
SOKID 28000		Kansas Highway Patrol
SOKID 28800		State Historical Society
SOKID 29600		Department of Labor
SOKID 30000		Department of Commerce

Institution Fringe Rates are setup for each Institution configured in the SMART system, or for an individual employee. Fringe rates are an important part of the Grants Proposal. The system populates the Fringe Rate field on the proposal budget only if you have entered a fringe rate type for the individual in his or her professional profile. The FMS Projects/Grants Team has worked with the state agencies to identify institution fringe rates and has performed the initial configuration to include these institution fringe rates. Agencies will be able to maintain Fringe Rates after implementation. Fringe Rates will be setup under the Statewide SETID of SOKID. Since this is a shared table, please be cautious about updating existing values that may be used by other agencies.

Maintaining Grants – Set-Up Values Job Aid

Statewide Management, Accounting and Reporting Tool

You may update or add additional information to your Fringe Rates page



The screenshot shows the SMART web application interface. On the left is a 'Menu' sidebar with categories like Institutions, Sponsored Projects, and Program Management. The main content area is titled 'Fringe Rates' and displays a form for a specific rate. The form includes fields for 'Effective Date' (set to 1/01/1901), 'Status' (set to Active), and 'Entered By'. Below these is a 'Details' table with columns for 'Federal', 'Rate Percentage' (30.00), 'Rate Type' (Regular), 'Currency' (USD), and 'Annual Amount'. At the bottom of the form are several action buttons: Save, Return to Search, Previous in List, Next in List, Notify, Update/Display, Include History, and Correct History.

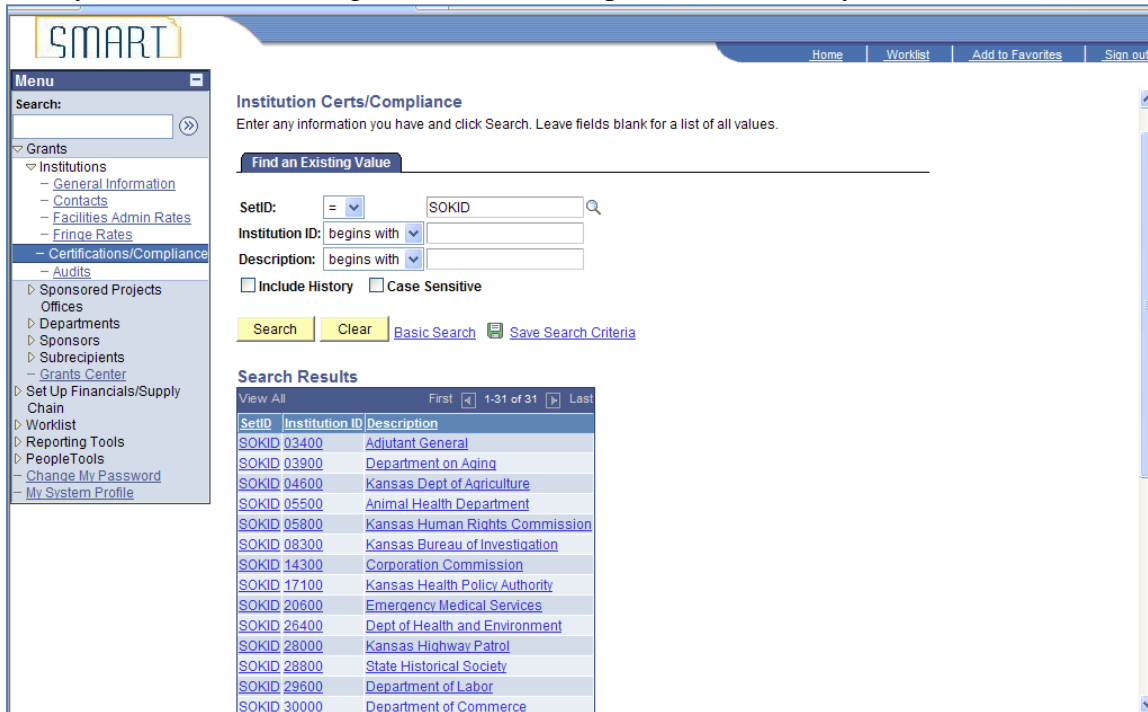
Field Name	Description
Effective Date	Use the Effective Date of the current date for newly created values. If updating an existing value use the appropriate date the change should be effective upon.
Status	Use the available statuses of Active or Inactive
Federal	Select to designate that the fringe rate type is a Federally-mandated rate
Rate Percentage	Enter the percentage at which fringe benefits should be calculated for the rate type.
Rate Type	Select a value from the list. Values are <i>Faculty</i> , <i>Other</i> , <i>Regular</i> and <i>Temporary</i> .
Currency	Select the currency that you want the system to use to calculate the fringe rate.
Annual Amount	If fringe benefits are calculated annually, enter an amount

Update and Maintain Institution Certifications/Compliance

ROLE: AGENCY GRANTS MAINTAINER

PATH: Grants > Institutions > Certifications/Compliance

Here you can select existing Certification/Compliance values for your Business Unit



SMART Home Worklist Add to Favorites Sign out

Menu

Search:

- Grants
 - Institutions
 - General Information
 - Contacts
 - Facilities Admin Rates
 - Fringe Rates
 - Certifications/Compliance**
 - Audits
 - Sponsored Projects
 - Offices
 - Departments
 - Sponsors
 - Subrecipients
 - Grants Center
- Set Up Financials/Supply Chain
- Worklist
- Reporting Tools
- People Tools
 - Change My Password
 - My System Profile

Institution Certs/Compliance

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

SetID: SOKID

Institution ID: begins with

Description: begins with

☐ Include History ☐ Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

Search Results

View All First 1-31 of 31 Last

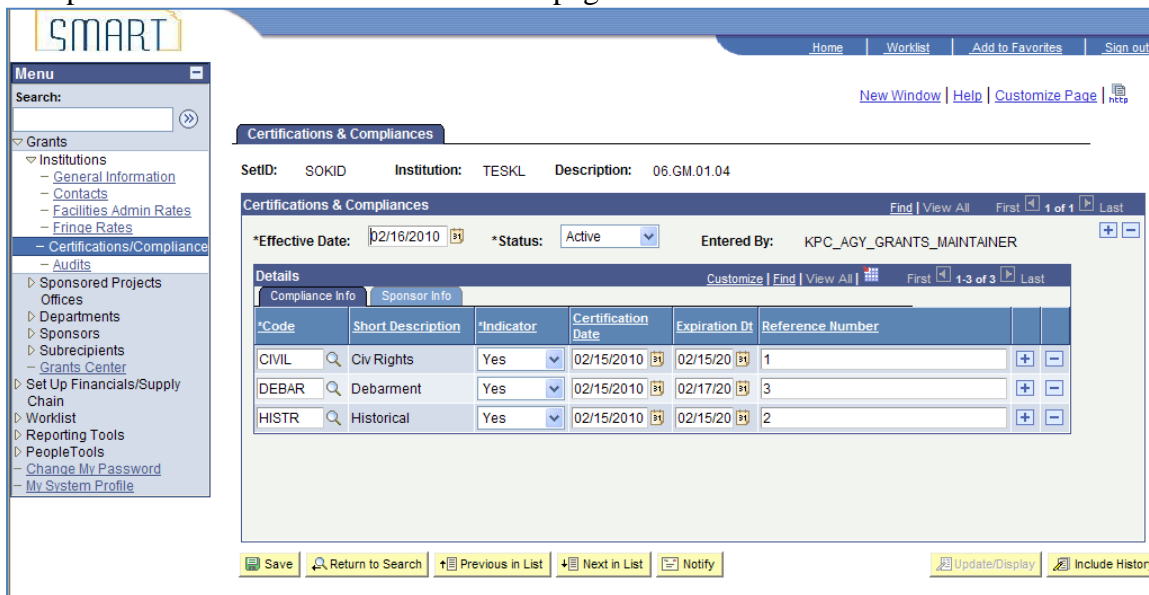
SetID	Institution ID	Description
SOKID 03400		Adjutant General
SOKID 03900		Department on Aging
SOKID 04600		Kansas Dept of Agriculture
SOKID 05500		Animal Health Department
SOKID 05800		Kansas Human Rights Commission
SOKID 08300		Kansas Bureau of Investigation
SOKID 14300		Corporation Commission
SOKID 17100		Kansas Health Policy Authority
SOKID 20600		Emergency Medical Services
SOKID 26400		Dept of Health and Environment
SOKID 28000		Kansas Highway Patrol
SOKID 28800		State Historical Society
SOKID 29600		Department of Labor
SOKID 30000		Department of Commerce

The **Certifications/Compliance** page in the Grants module maintains the status of institutional compliance with required federal certifications. Institutions that engage in federally-sponsored projects must certify their observance of regulations governing organizations receiving federal funding. Common certifications include Drug-Free Workplace, Disclosure of Lobbying Activities and Non-Delinquency on Federal Debt. Most federal grant sponsors require confirmation of compliance with these certifications, or an explanation of non-compliance, on proposal submission forms. The FMS Projects/Grants Team has worked with the state agencies to identify Institution Certifications and has performed the initial configuration to include the Institution Certifications. Agencies will be able to maintain Institution Certifications. Since institutions will be setup under the Statewide SETID of SOKID, Institution Certifications will be set up the same. Since this is a shared table, please be cautious about updating existing values that may be used by other agencies.

Maintaining Grants – Set-Up Values Job Aid

Statewide Management, Accounting and Reporting Tool

Compliance Information is entered on this page



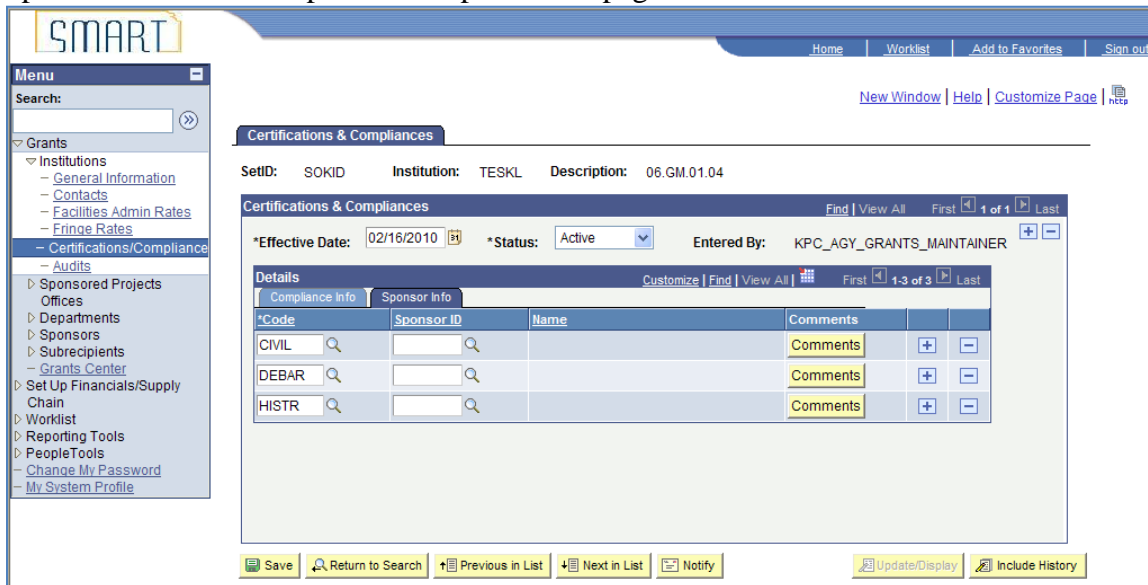
The screenshot shows the SMART web application interface. On the left is a menu with options like Grants, Institutions, Departments, and Worklist. The main area is titled 'Certifications & Compliances' and displays a table of certification data. The table has columns for *Code, Short Description, *Indicator, Certification Date, Expiration Dt, and Reference Number. The data rows are: CIVIL (Civ Rights, Yes, 02/15/2010, 02/15/20, 1), DEBAR (Debarment, Yes, 02/15/2010, 02/17/20, 3), and HISTR (Historical, Yes, 02/15/2010, 02/15/20, 2). The page also includes a search bar, a status dropdown, and various navigation buttons at the bottom.

Field Name	Description
Effective Date	Use the Effective Date of the current date for newly created values. If updating an existing value use the appropriate date the change should be effective upon.
Status	Use the available statuses of Active or Inactive
Code	Select a certification code. This code is established on a separate page
Indicator	Select the Indicator status. This field describes the compliance status of the certification. Available values are <i>Yes</i> , <i>No</i> , <i>N/A</i> and <i>Pending</i> .
Certification Date	Enter the certification date
Expiration Date	Enter the date the certification is set to expire
Reference Number	Enter any reference number that may be associated with certification

Maintaining Grants – Set-Up Values Job Aid

Statewide Management, Accounting and Reporting Tool

Sponsor Information is put on the Sponsor tab page.



SMART

Home | Worklist | Add to Favorites | Sign out

New Window | Help | Customize Page | net

Menu

Search: []

Grants

- Institutions
 - General Information
 - Contacts
 - Facilities Admin Rates
 - Fincoe Rates
- Certifications/Compliance
- Audits
- Sponsored Projects
- Offices
- Departments
- Sponsors
- Subrecipients
- Grants Center
- Set Up Financials/Supply Chain
- Worklist
- Reporting Tools
- PeopleTools
- Change My Password
- My System Profile

Certifications & Compliances

SetID: SOKID Institution: TESKL Description: 06.GM.01.04

Certifications & Compliances Find | View All First 1 of 1 Last

*Effective Date: 02/16/2010 By *Status: Active Entered By: KPC_AGY_GRANTS_MAINTAINER

Details Customize | Find | View All First 1-3 of 3 Last

*Code	Sponsor ID	Name	Comments		
CIVIL	[]		Comments	+	-
DEBAR	[]		Comments	+	-
HISTR	[]		Comments	+	-

Save Return to Search Previous in List Next in List Notify Update/Display Include History

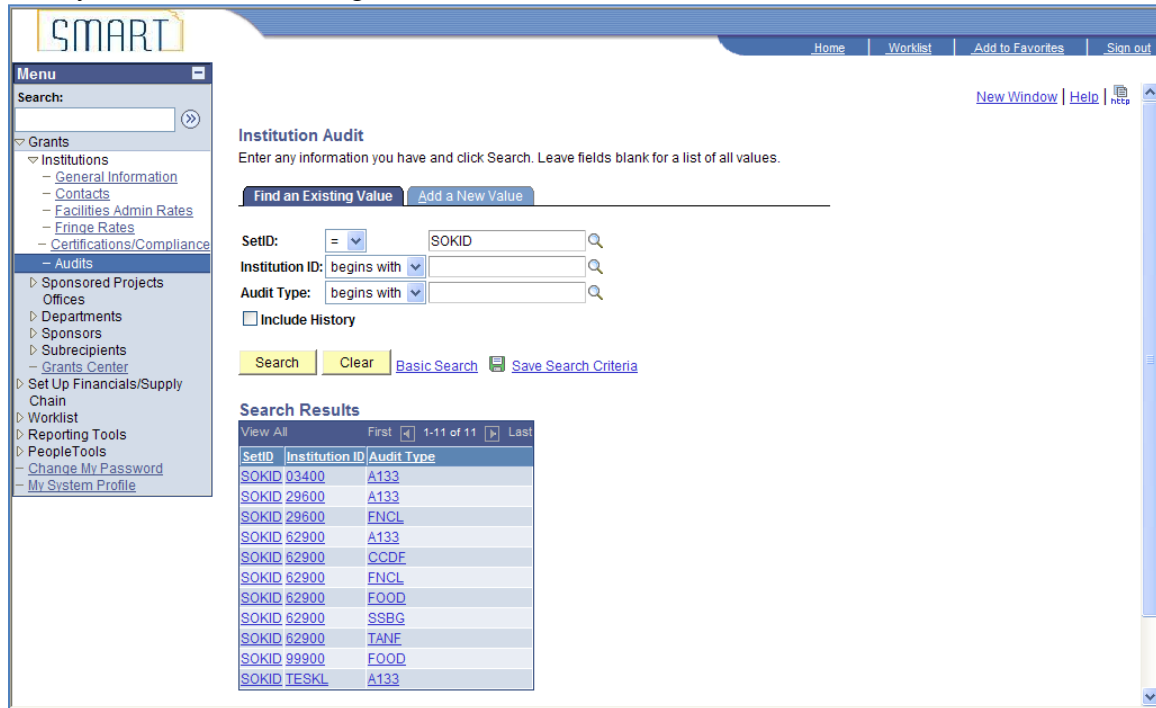
Field Name	Description
Code	The Certification Code carries over from the Compliance Info tab
Sponsor ID	Select a Sponsor ID to identify this certification as associated with a particular sponsor
Comments	Enter any comments regarding the certification

Update and Maintain Institution Audits

ROLE: AGENCY GRANTS MAINTAINER

PATH: Grants > Institutions > Audits

Here you can select existing Institution Audits



The screenshot shows the SMART web application interface. On the left is a navigation menu with options like Grants, Institutions, Audits, etc. The main area is titled 'Institution Audit' and contains search fields for SetID, Institution ID, and Audit Type. Below these fields is a 'Search' button and a 'Clear' button. A 'Search Results' table is displayed at the bottom, showing a list of institution audits with columns for SetID, Institution ID, and Audit Type.

SetID	Institution ID	Audit Type
SOKID 03400		A133
SOKID 29600		A133
SOKID 29600		FNCL
SOKID 62900		A133
SOKID 62900		CCDF
SOKID 62900		FNCL
SOKID 62900		FOOD
SOKID 62900		SSBG
SOKID 62900		TANF
SOKID 99900		FOOD
SOKID TESKL		A133

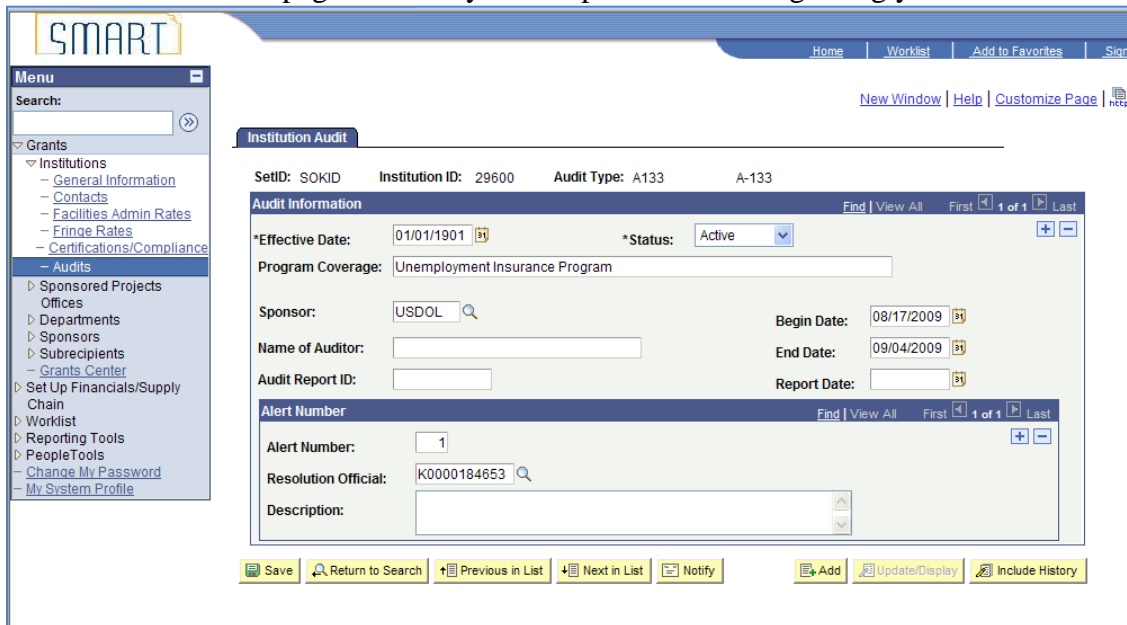
Institutions receiving federal grant funding are required to adhere to specific Office of Management and Budget (OMB) Circulars, which define the cost principles (Circular A-87 for state and local governments) and administrative rules (Circular A-102, Uniform Administrative Rules for Grants and Cooperative Agreement with State and Local Governments) for managing federal funds. Periodic audits are conducted to determine grantee compliance with these federal guidelines, including annual audits of states, local governments, and non-profit organizations receiving more than \$500,000 annually (as prescribed by OMB Circular A-133).

The **Institution Audits** page provides agencies with a place to enter basic information regarding the audits conducted on their grants. Agencies will be able to maintain Institution Audits after implementation. Since institutions will be setup under the Statewide SETID of SOKID, Institution Audits will be set up that way as well. Since this is a shared table, please be cautious about updating existing values that may be used by other agencies.

Maintaining Grants – Set-Up Values Job Aid

Statewide Management, Accounting and Reporting Tool

The Institution Audit page is where you set up information regarding your audit



The screenshot shows the SMART web application interface. On the left is a 'Menu' sidebar with a search bar and a tree view containing 'Grants' (with sub-items like Institutions, General Information, Contacts, etc.) and 'Audits' (with sub-items like Sponsored Projects, Offices, etc.). The main content area is titled 'Institution Audit' and displays a form for setting up an audit. The form includes fields for 'SetID: SOKID', 'Institution ID: 29600', and 'Audit Type: A133'. Below this is the 'Audit Information' section with fields for 'Effective Date' (01/01/1901), 'Status' (Active), 'Program Coverage' (Unemployment Insurance Program), 'Sponsor' (USDOL), 'Begin Date' (08/17/2009), 'End Date' (09/04/2009), 'Name of Auditor', 'Audit Report ID', and 'Report Date'. At the bottom is the 'Alert Number' section with fields for 'Alert Number' (1), 'Resolution Official' (K0000184653), and 'Description'. Navigation buttons like 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', 'Add', 'Update/Display', and 'Include History' are at the bottom of the form.

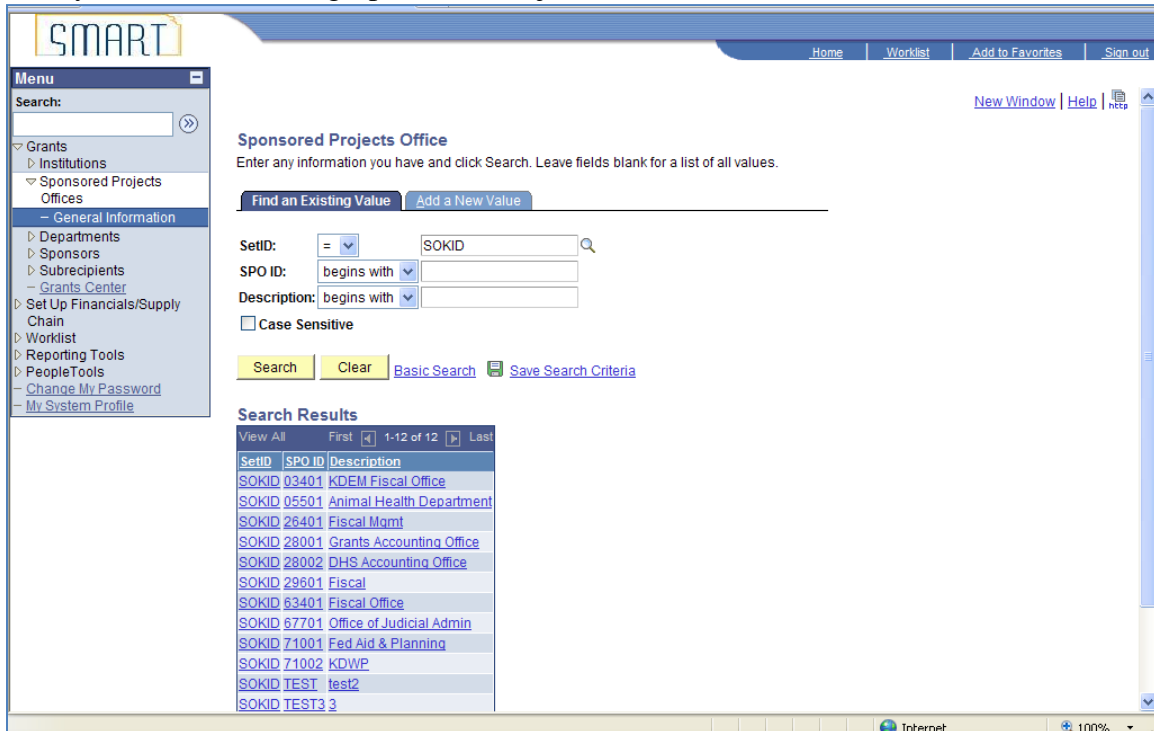
Field Name	Description
Effective Date	Use the Effective Date of the current date for newly created values. If updating an existing value use the appropriate date the change should be effective upon.
Status	Use the available statuses of Active or Inactive
Program Coverage	Enter the Program Coverage for the Audit
Sponsor	Select the Sponsor for which the audit is being conducted
Name of Auditor	Enter the Name of the auditor
Audit Report ID	Enter an Audit Report ID, if applicable
Begin Date	Select the begin date of the audit
End Date	Select the end date of the audit
Report Date	Select the report date of the audit
Alert Number	Enter an Alert number for the audit to track findings individually
Resolution Official	Select the resolution official for the audit finding
Description	Enter a description of the audit finding

Update and Maintain Sponsored Projects Office General Information

ROLE: AGENCY GRANTS MAINTAINER

PATH: Grants > Sponsored Projects Offices > General Information

Here you can find existing Sponsored Projects Office General Information



Sponsored Projects Office
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

SetID:

SPO ID:

Description:

☐ Case Sensitive

[Basic Search](#) [Save Search Criteria](#)


Search Results
View All First 1-12 of 12 Last

SetID	SPO ID	Description
SOKID 03401		KDEM Fiscal Office
SOKID 05501		Animal Health Department
SOKID 26401		Fiscal Mgmt
SOKID 28001		Grants Accounting Office
SOKID 28002		DHS Accounting Office
SOKID 29601		Fiscal
SOKID 63401		Fiscal Office
SOKID 67701		Office of Judicial Admin
SOKID 71001		Fed Aid & Planning
SOKID 71002		KDWP
SOKID TEST	test2	
SOKID TEST3	3	

The **Sponsored Projects Office (SPO)** General Information page is used to house the contact information for each Sponsored Projects Office. The SPO is associated with one or more departments. The FMS Projects/Grants Team has setup the initial values with information obtained from State agencies. All agencies will use a common list of Sponsored Projects Offices; therefore, when adding new values to this table, agencies will use the statewide SetID of SOKID. Agencies will maintain the Sponsored Projects Office General Information page after implementation. Since this is a shared table, please be cautious about updating existing values that may be used by other agencies.

Maintaining Grants – Set-Up Values Job Aid

You may add additional Sponsored Projects General Information using the Statewide SetID of SOKID



SMART

Home

Menu

Search:

Grants

Institutions

Sponsored Projects Offices

General Information

Departments

Sponsors

Subrecipients

Grants Center

Set Up Financials/Supply Chain

Worklist

Reporting Tools

PeopleTools

Change My Password

My System Profile

Sponsored Projects Office

Find an Existing Value Add a New Value

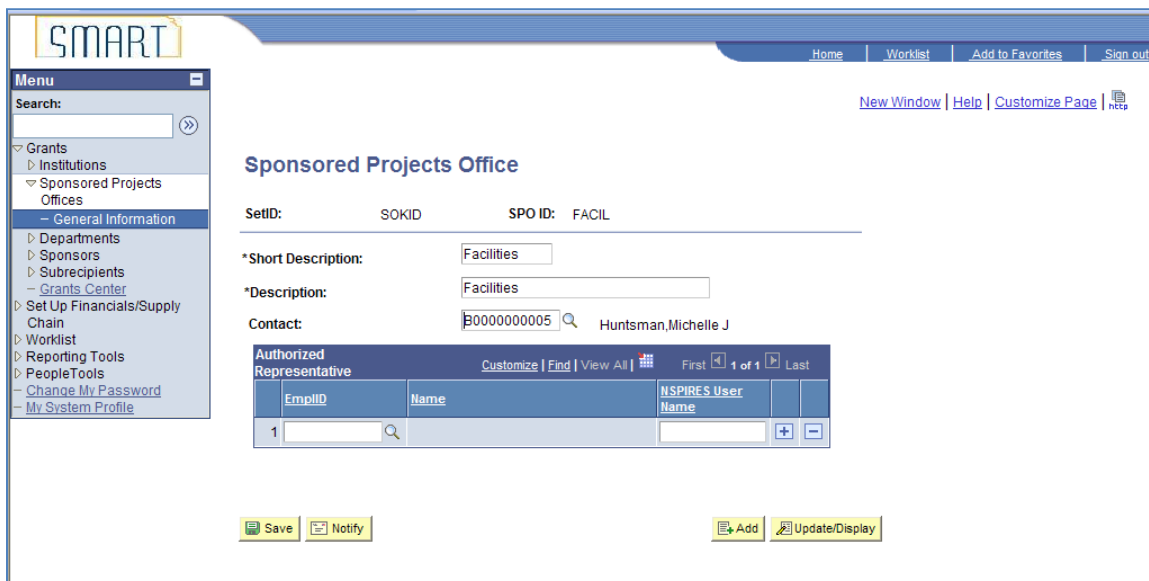
SetID: SOKID

SPO ID:

Add

Find an Existing Value Add a New Value

Field Name	Description
SetID	Use the statewide SetID of SOKID
SPO ID	Enter the SPO ID as defined by your agency



SMART

Home Worklist Add to Favorites Sign out

New Window Help Customize Page

Sponsored Projects Office

SetID: SOKID SPO ID: FACIL

*Short Description: Facilities

*Description: Facilities

Contact: B0000000005 Huntsman, Michelle J

Authorized Representative

Customize Find View All First 1 of 1 Last

EmpID	Name	NSPIRES User Name
1		

Save Notify Add Update/Display

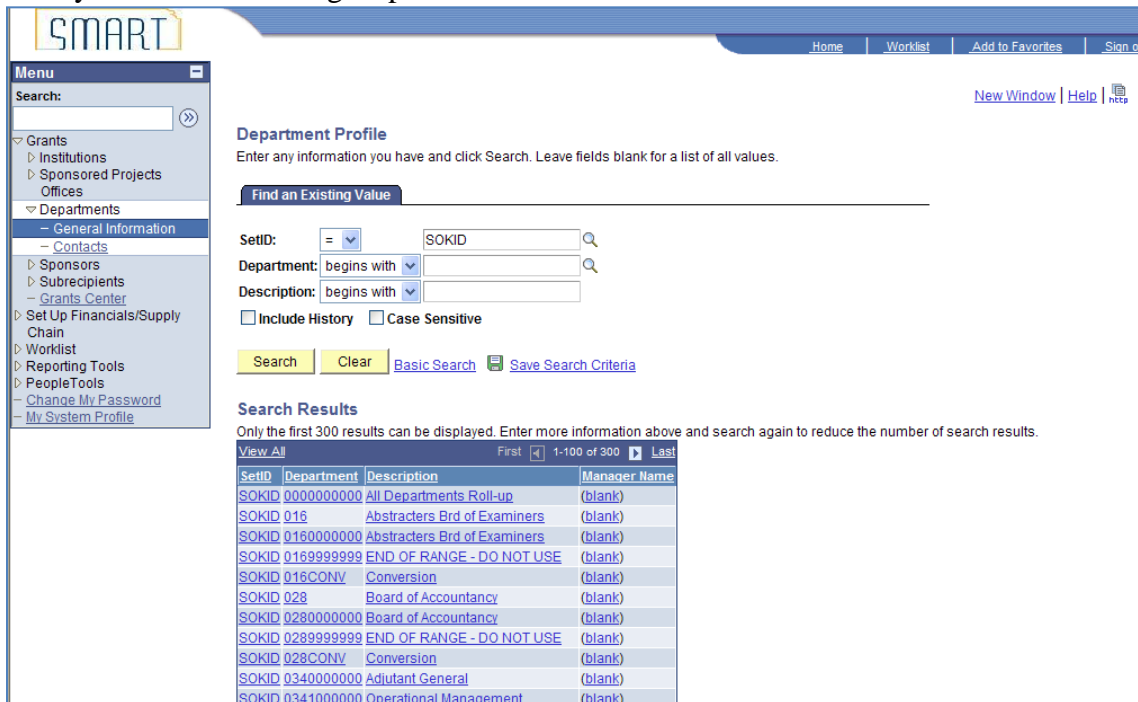
Field Name	Description
Short Description	Enter the SPO short description
Description	Enter the SPO description
Contact	Select the SPO main contact
EmpID	Select the Employee ID of the Authorized Representative
NSPIRES User Name	Enter the NSPIRES User Name, if registered for NASA online grants management

Update and Maintain Department General Information

ROLE: AGENCY GRANTS MAINTAINER

PATH: Grants > Departments > General Information

Here you can find existing Department General Information



The screenshot shows the SMART web application interface. On the left is a navigation menu with options like Grants, Departments, Sponsors, and Reports. The main content area is titled 'Department Profile' and contains a search form. The search results are displayed in a table with columns for SetID, Department, Description, and Manager Name.

Department Profile
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

SetID: [dropdown] [input: SOKID] [search icon]
 Department: begins with [dropdown] [input] [search icon]
 Description: begins with [dropdown] [input] [search icon]

☐ Include History ☐ Case Sensitive

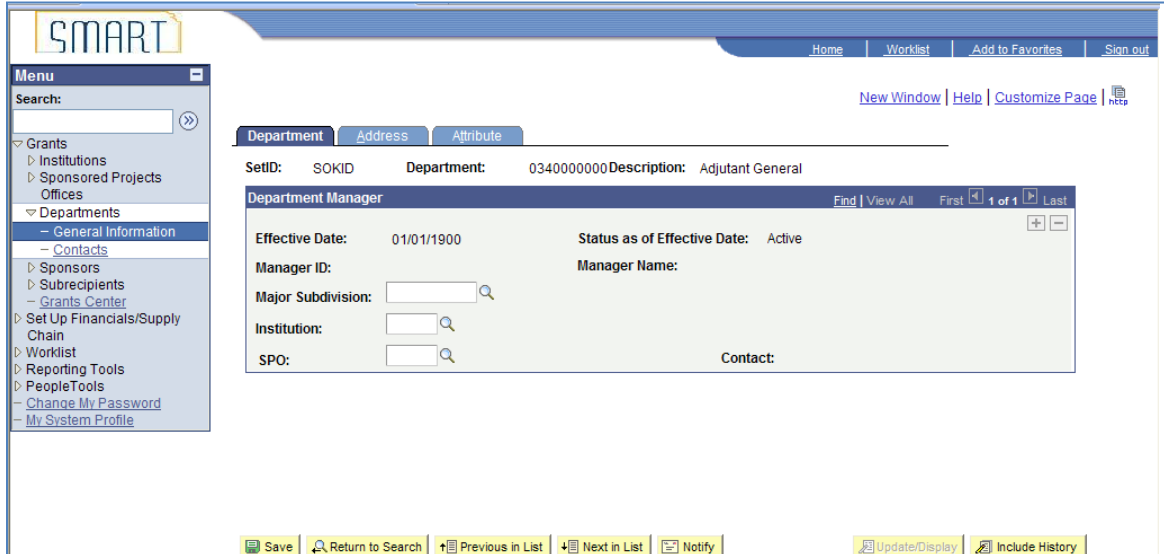
[Search] [Clear] [Basic Search](#) [Save Search Criteria](#)

Search Results
Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of search results.

SetID	Department	Description	Manager Name
SOKID 000000000	All Departments Roll-up		(blank)
SOKID 016	Abstracters Brd of Examiners		(blank)
SOKID 016000000	Abstracters Brd of Examiners		(blank)
SOKID 016999999	END OF RANGE - DO NOT USE		(blank)
SOKID 016CONV	Conversion		(blank)
SOKID 028	Board of Accountancy		(blank)
SOKID 028000000	Board of Accountancy		(blank)
SOKID 028999999	END OF RANGE - DO NOT USE		(blank)
SOKID 028CONV	Conversion		(blank)
SOKID 034000000	Adjutant General		(blank)
SOKID 034100000	Operational Management		(blank)

The Grants **Department Profile** pages are used to create and maintain information about the institution's research units for the purpose of administering grants. Department values represent the hierarchical breakdown of the institution into smaller entities, such as units, divisions and centers. The FMS Projects/Grants Team has setup the initial values with information obtained from state agencies. Agencies will maintain the Department General Information pages after implementation. Departments will be setup under the agency-specific SETID.

You have the ability to update information on your department pages



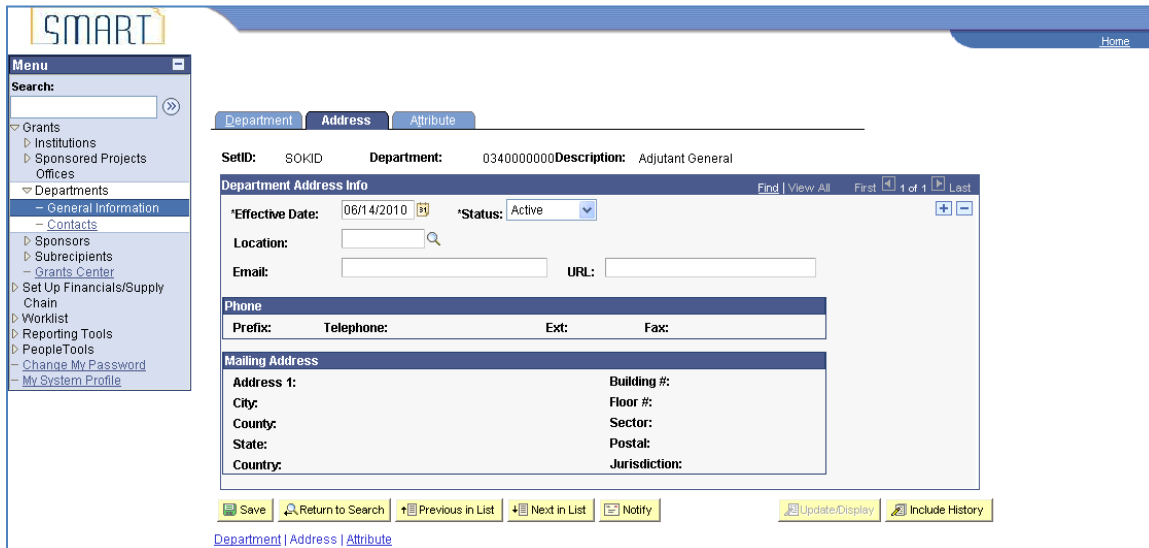
The screenshot shows the SMART web application interface. On the left is a 'Menu' sidebar with a search bar and a tree view containing 'Grants' (Institutions, Sponsored Projects, Offices), 'Departments' (General Information, Contacts), 'Sponsors' (Subrecipients, Grants Center), 'Set Up Financials/Supply Chain', 'Worklist', 'Reporting Tools', 'PeopleTools', 'Change My Password', and 'My System Profile'. The main content area has tabs for 'Department', 'Address', and 'Attribute'. Below these, it displays 'SetID: SOKID', 'Department: 0340000000', and 'Description: Adjutant General'. A 'Department Manager' section contains a table with fields: 'Effective Date: 01/01/1900', 'Status as of Effective Date: Active', 'Manager ID:', 'Major Subdivision:' (with a search icon), 'Institution:' (with a search icon), 'SPO:' (with a search icon), and 'Manager Name:'. At the bottom, there is a row of buttons: 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', 'Update/Display', and 'Include History'.

Field Name	Description
Major Subdivision	Select the Major Subdivision from the lookup
Institution	Select the Institution from the lookup
SPO	Select the Sponsored Projects Office from the lookup

Maintaining Grants – Set-Up Values Job Aid

Statewide Management, Accounting and Reporting Tool

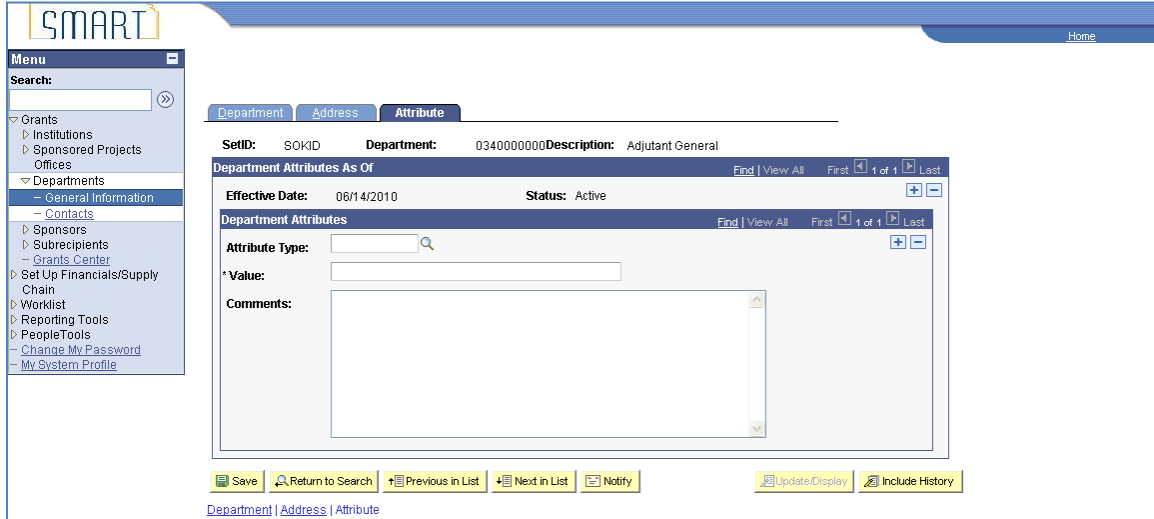
Enter information on the Address tab



The screenshot shows the SMART web application interface. On the left is a 'Menu' sidebar with a search bar and a tree view containing categories like Grants, Institutions, Sponsored Projects, Offices, Departments, General Information, Contacts, Sponsors, Subrecipients, Grants Center, Set Up Financials/Supply Chain, Worklist, Reporting Tools, PeopleTools, Change My Password, and My System Profile. The main content area has a header with 'SMART' and 'Home'. Below the header are tabs for 'Department', 'Address', and 'Attribute'. The 'Address' tab is active. It displays a form for 'Department Address Info' with fields for 'Effective Date' (06/14/2010), 'Status' (Active), 'Location', 'Email', and 'URL'. Below these are sections for 'Phone' (Prefix, Telephone, Ext, Fax) and 'Mailing Address' (Address 1, City, County, State, Country, Building #, Floor #, Sector, Postal, Jurisdiction). At the bottom are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', 'Update/Display', and 'Include History'. A breadcrumb trail at the bottom reads 'Department | Address | Attribute'.

Field Name	Description
Effective Date	Use the Effective Date of the current date for newly created values. If updating an existing value use the appropriate date the change should be effective upon.
Status	Use the available statuses of Active or Inactive
Location	Select the location of the Department
Email	Enter the email address for the Department
URL	Enter the URL of the department, if applicable

Enter information on the Attribute tab



The screenshot shows the SMART web application interface. On the left is a 'Menu' sidebar with categories like Grants, Departments, and Sponsors. The top navigation bar has tabs for 'Department', 'Address', and 'Attribute', with 'Attribute' being the active tab. The main content area displays 'Department Attributes As Of' for 'SetID: SOKID' and 'Department: 0340000000'. It includes fields for 'Effective Date: 06/14/2010' and 'Status: Active'. Below these are input fields for 'Attribute Type', 'Value', and a 'Comments' text area. At the bottom, there are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', 'Update/Display', and 'Include History'.

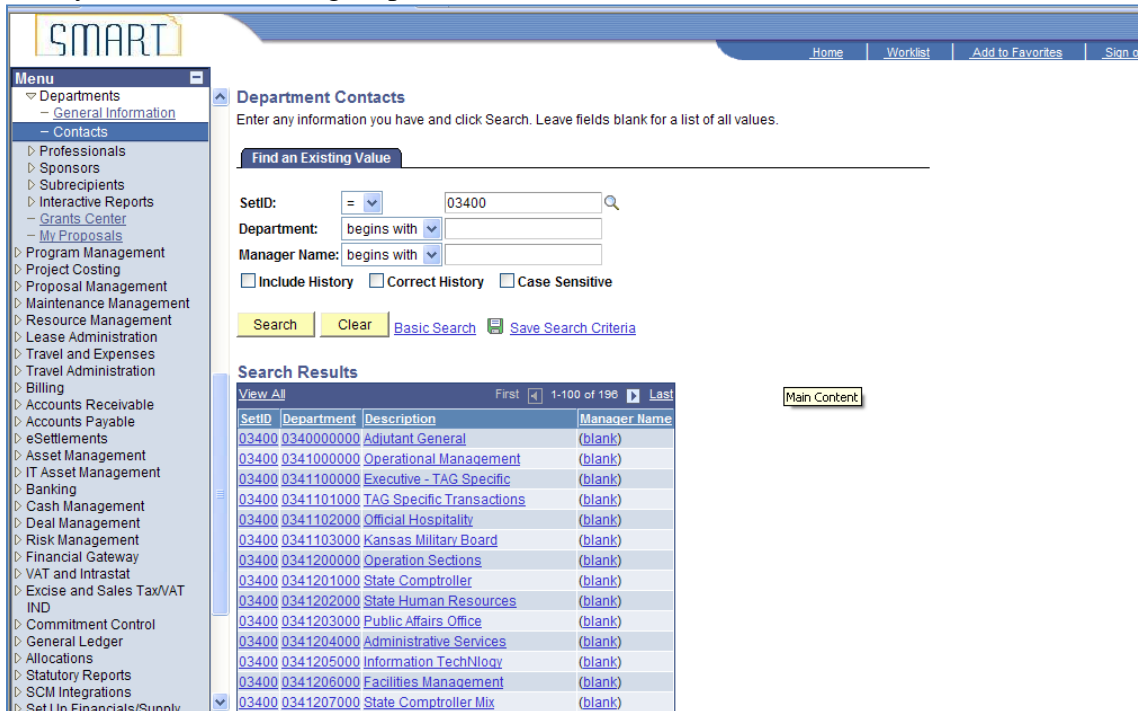
Field Name	Description
Attribute Type	Select the attribute type of the Department
Value	Enter a value associated with the Department attribute
Comments	Enter comments regarding the Department attribute

Update and Maintain Department Contacts

ROLE: AGENCY GRANTS MAINTAINER

PATH: Grants > Departments > Contacts

Here you can find existing Department Contacts



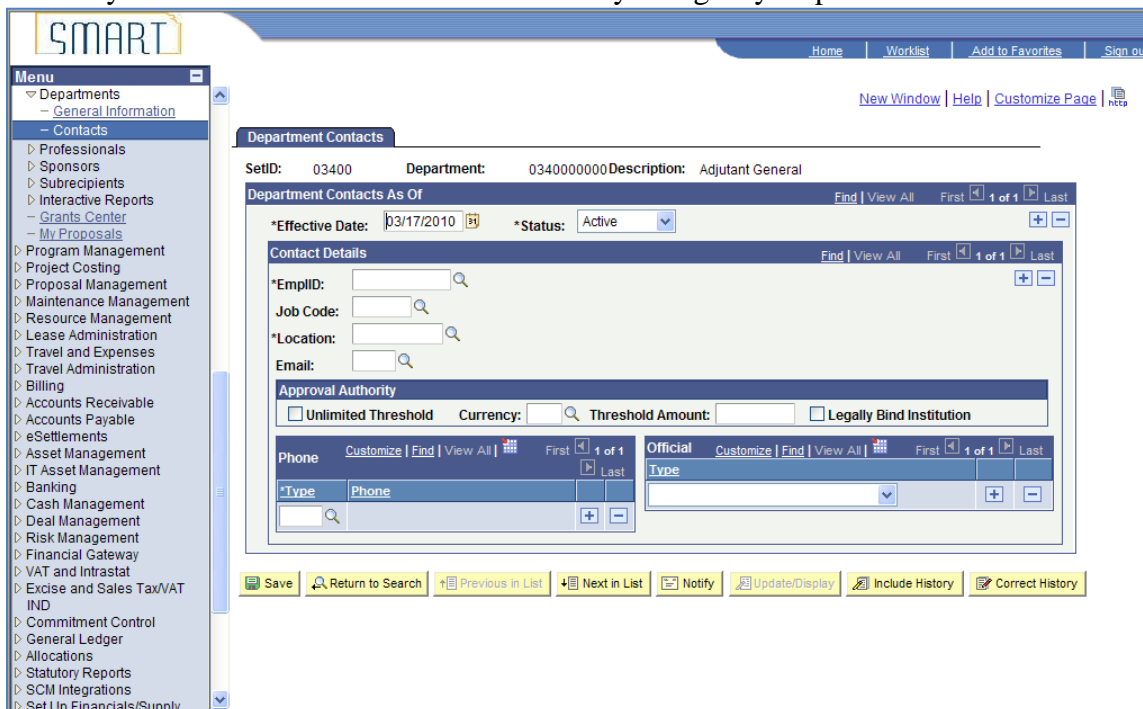
The screenshot shows the SMART web application interface. On the left is a navigation menu with categories like Departments, Professional Services, and Program Management. The main content area is titled 'Department Contacts' and includes a search section with fields for SetID, Department, and Manager Name. Below the search section is a table of search results showing various departments and their associated managers.

SetID	Department	Description	Manager Name
03400	03400000000	Adjutant General	(blank)
03400	03410000000	Operational Management	(blank)
03400	03411000000	Executive - TAG Specific	(blank)
03400	03411010000	TAG Specific Transactions	(blank)
03400	03411020000	Official Hospitality	(blank)
03400	03411030000	Kansas Military Board	(blank)
03400	03412000000	Operation Sections	(blank)
03400	03412010000	State Comptroller	(blank)
03400	03412020000	State Human Resources	(blank)
03400	03412030000	Public Affairs Office	(blank)
03400	03412040000	Administrative Services	(blank)
03400	03412050000	Information Technology	(blank)
03400	03412060000	Facilities Management	(blank)
03400	03412070000	State Comptroller Mix	(blank)

The **Department Contacts** page is used to set up contact information and approval authority for the individuals who are associated with a specific department. The agency department can then use this information for grant proposal and award processing. The FMS Projects/Grants Team has worked with the state agencies to identify contact persons by Department and their threshold authority and has performed the initial configuration to include this contact information. Agencies will maintain department contacts under their Agency SetID after implementation. Departments will be setup under the agency-specific SetID.

Maintaining Grants – Set-Up Values Job Aid

You may add additional contact information to your agency Departments



The screenshot shows the SMART web application interface. On the left is a 'Menu' with various options like Departments, Contacts, Professionals, Sponsors, etc. The main area is titled 'Department Contacts' and shows a form for adding or updating contact information. The form includes fields for 'Effective Date', 'Status', 'Employee ID', 'Job Code', 'Location', 'Email', 'Approval Authority', and 'Phone'. There are also sections for 'Phone' and 'Official' with dropdown menus and buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', 'Update/Display', 'Include History', and 'Correct History'.

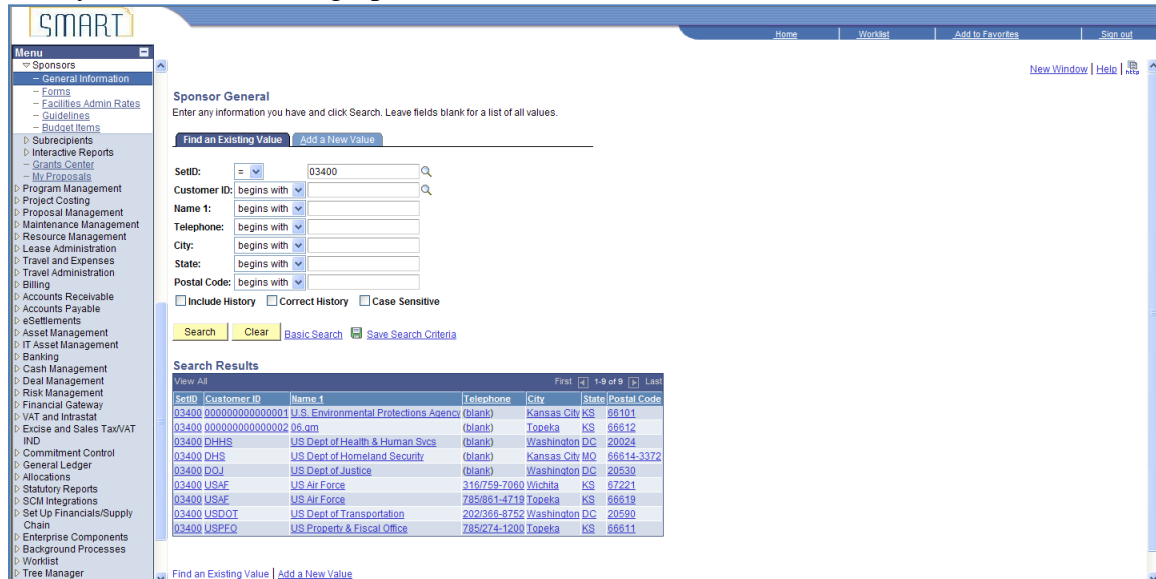
Field Name	Description
Effective Date	Use the Effective Date of the current date for newly created values. If updating an existing value use the appropriate date the change should be effective upon.
Status	Use the available statuses of Active or Inactive
Employee ID	Select the Employee ID of the contact
Job Code	Select the Job Code associated with the contact
Location	Select the location of the contact
Email	Select the email type for the contact
Approval Authority Section	Select any criteria that may apply to the contact
Phone Section	Select the phone Type. The phone number is configured outside this page
Official Section	Select an Official Type of the contact, if applicable

Update and Maintain Sponsor General Information

ROLE: AGENCY GRANTS MAINTAINER

PATH: Grants > Sponsors > General Information

Here you can find existing Sponsor General Information



Sponsor General
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

SetID: [dropdown] [text: 03400] [search icon]
 Customer ID: [dropdown: begins with] [text:] [search icon]
 Name 1: [dropdown: begins with] [text:] [search icon]
 Telephone: [dropdown: begins with] [text:] [search icon]
 City: [dropdown: begins with] [text:] [search icon]
 State: [dropdown: begins with] [text:] [search icon]
 Postal Code: [dropdown: begins with] [text:] [search icon]

☐ Include History ☐ Correct History ☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

Search Results

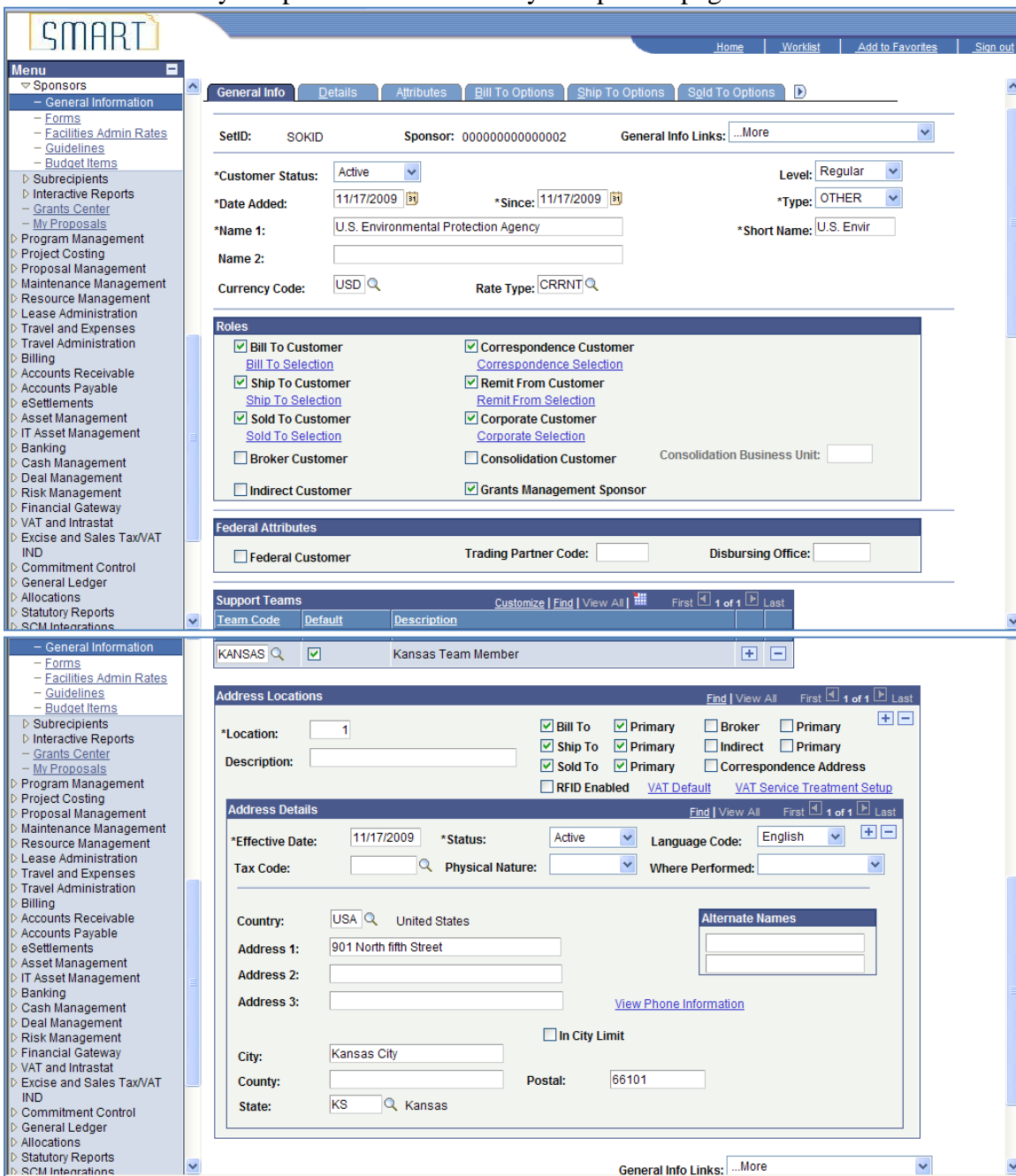
SetID	Customer ID	Name 1	Telephone	City	State	Postal Code
03400	0000000000000001	U.S. Environmental Protection Agency	(blank)	Kansas City	KS	66101
03400	0000000000000002	HS.com	(blank)	Topeka	KS	66612
03400	DHHS	US Dept of Health & Human Svcs	(blank)	Washington	DC	20024
03400	DHS	US Dept of Homeland Security	(blank)	Kansas City	MO	66114-3372
03400	DOJ	US Dept of Justice	(blank)	Washington	DC	20530
03400	USAF	US Air Force	316/759-7060	Wichita	KS	67221
03400	USAF	US Air Force	785/861-4719	Topeka	KS	66618
03400	USDOT	US Dept of Transportation	202/366-8752	Washington	DC	20590
03400	USPFO	US Property & Fiscal Office	785/274-1200	Topeka	KS	66611

A **Sponsor** is defined as an external entity or source that funds research and other projects. The Grants module enables you to enter information related to a Sponsor within the Sponsor General Information pages. The FMS Projects/Grants Team has worked with state agencies to determine the information needed for each of the Sponsors setup in the system. Sponsors will be set up by state agency and agencies may update or add additional Sponsors General Information. Sponsors General Information will be setup under the agency-specific SetID.

Maintaining Grants – Set-Up Values Job Aid

Statewide Management, Accounting and Reporting Tool

You have the ability to update information on your sponsor pages.



SMART Home Worklist Add to Favorites Sign out

Menu

- ▼ Sponsors
 - General Information
 - Forms
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 - Guidelines
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- Subrecipients
- Interactive Reports
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- Program Management
- Project Costing
- Proposal Management
- Maintenance Management
- Resource Management
- Lease Administration
- Travel and Expenses
- Travel Administration
- Billing
- Accounts Receivable
- Accounts Payable
- eSettlements
- Asset Management
- IT Asset Management
- Banking
- Cash Management
- Deal Management
- Risk Management
- Financial Gateway
- VAT and Intrastat
- Excise and Sales Tax/VAT IND
- Commitment Control
- General Ledger
- Allocations
- Statutory Reports
- SCM Interactions

General Info Details Attributes Bill To Options Ship To Options Sold To Options

SetID: SOKID Sponsor: 000000000000002 General Info Links: ...More

*Customer Status: Active Level: Regular

*Date Added: 11/17/2009 *Since: 11/17/2009 *Type: OTHER

*Name 1: U.S. Environmental Protection Agency *Short Name: U.S. Envir

Name 2:

Currency Code: USD Rate Type: CRRNT

Roles

<input checked="" type="checkbox"/> Bill To Customer Bill To Selection	<input checked="" type="checkbox"/> Correspondence Customer Correspondence Selection
<input checked="" type="checkbox"/> Ship To Customer Ship To Selection	<input checked="" type="checkbox"/> Remit From Customer Remit From Selection
<input checked="" type="checkbox"/> Sold To Customer Sold To Selection	<input checked="" type="checkbox"/> Corporate Customer Corporate Selection
<input type="checkbox"/> Broker Customer	<input type="checkbox"/> Consolidation Customer Consolidation Business Unit:
<input type="checkbox"/> Indirect Customer	<input checked="" type="checkbox"/> Grants Management Sponsor

Federal Attributes

☐ Federal Customer Trading Partner Code: Disbursing Office:

Support Teams Customize Find View All First 1 of 1 Last

Team Code	Default	Description
KANSAS	<input checked="" type="checkbox"/>	Kansas Team Member

Address Locations Find View All First 1 of 1 Last

*Location: 1

Description:

☒ Bill To ☒ Primary ☐ Broker ☐ Primary

☒ Ship To ☒ Primary ☐ Indirect ☐ Primary

☒ Sold To ☒ Primary ☐ Correspondence Address

☐ RFID Enabled [VAT Default](#) [VAT Service Treatment Setup](#)

Address Details Find View All First 1 of 1 Last

*Effective Date: 11/17/2009 *Status: Active Language Code: English

Tax Code: Physical Nature: Where Performed:

Country: USA United States

Address 1: 901 North fifth Street

Address 2:

Address 3:

[View Phone Information](#)

☐ In City Limit

City: Kansas City

County:

Postal: 66101

State: KS Kansas

Alternate Names

General Info Links: ...More

Field Name	Description
Customer Status	Use the available statuses of Active or Inactive
Date Added	Use the current date for newly created values. If updating an existing value leave the date that was entered when the value was created.
*Since	Use the same value from the "Date Added" field
Type	Select the type of sponsor you are entering. Valid values are <i>FedGov</i> ,



Maintaining Grants – Set-Up Values Job Aid

Statewide Management, Accounting and Reporting Tool

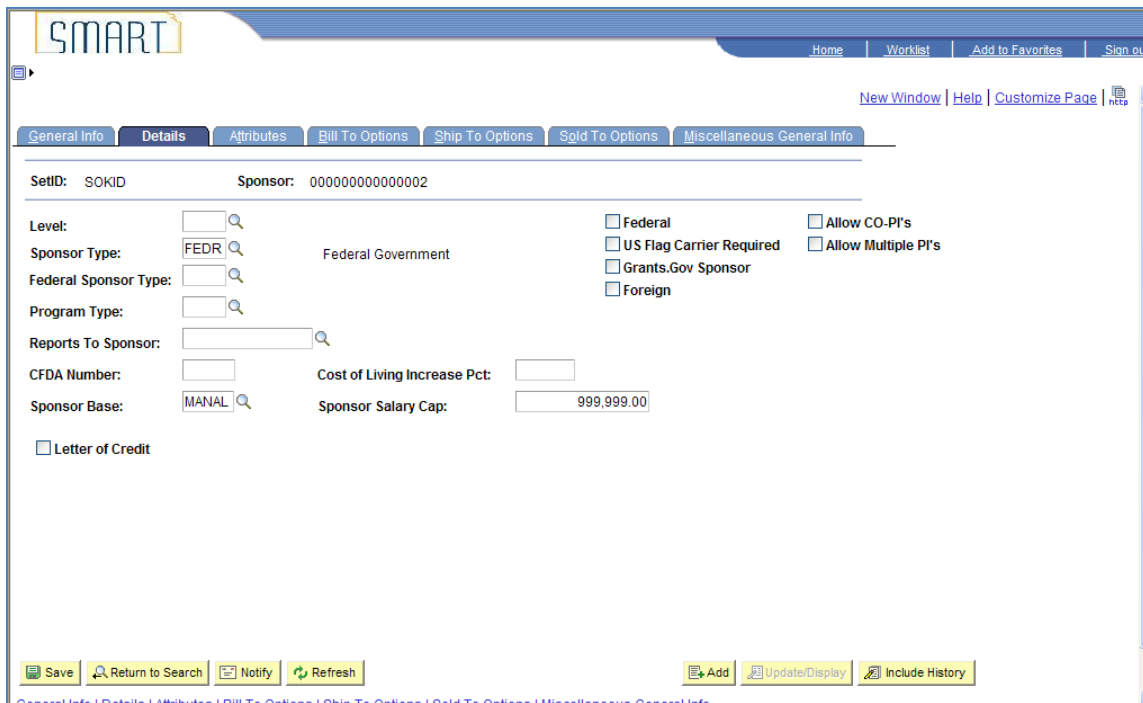


	<i>LocGov, Other and State</i>
*Name 1	Enter the full name of the sponsor
Currency Code	Select the valid value of USD
Rate Type	Select the valid value of CRRNT
Bill To Customer	Check this box
Ship To Customer	Check this box
Sold To Customer	Check this box
Correspondence Customer	Check this box
Remit From Customer	Check this box
Corporate Customer	Check this box
Grants Management Sponsor	Check this box
Team Code	Select the valid value of KANSAS
Default	Check this box
*Location	Enter a sequence number for the address
Description	Enter a description of the address
Bill To	Check this box
Primary	Check this box to indicate this is the primary Bill To location for the sponsor
Ship To	Check this box
Primary	Check this box to indicate this is the primary Ship To location for the sponsor
Sold To	Check this box
Primary	Check this box to indicate this is the primary Sold To location for the sponsor
*Effective Date	Enter the effective date for the address being entered
*Status	Use the available statuses of Active or Inactive
Country	USA should default into this field
Address 1	Enter the street address
Address 2	Additional field for street address, if needed
Address 3	Additional field for street address, if needed
City	Enter the city
State	Enter the state
Postal	Enter the zip code

Maintaining Grants – Set-Up Values

Job Aid

Statewide Management, Accounting and Reporting Tool




SMART


Home | Worklist | Add to Favorites | Sign out


[New Window](#) | [Help](#) | [Customize Page](#) | [NETS](#)


General Info | **Details** | Attributes | Bill To Options | Ship To Options | Sold To Options | Miscellaneous General Info


SetID: SOKID Sponsor: 000000000000002

Level: 


Sponsor Type: FEDR  Federal Government

Federal Sponsor Type: 

Program Type: 


Reports To Sponsor: 

CFDA Number: Cost of Living Increase Pct:

Sponsor Base: MANAL  Sponsor Salary Cap: 999,999.00

☐ Letter of Credit

☐ Federal ☐ Allow CO-PI's
☐ US Flag Carrier Required ☐ Allow Multiple PI's
☐ Grants.Gov Sponsor
☐ Foreign

Save |  Return to Search | Notify | Refresh | Add | Update/Display | Include History

[General Info](#) | [Details](#) | [Attributes](#) | [Bill To Options](#) | [Ship To Options](#) | [Sold To Options](#) | [Miscellaneous General Info](#)

Field Name	Description
Sponsor Type	Select from the valid values of <i>Corporation, Foundation, Federal Government, For Profit Organization, Non Profit Organization, Other</i> or <i>State Government</i>
Sponsor Salary Cap	Enter the sponsor salary cap, if applicable
Letter of Credit	Check this box to enter a Letter of Credit. Click Save after checking the box, then click the lookup field to identify the Sponsor. This will bring up another set of fields where you can enter the actual LOC Number and any additional Comments to help you identify the letter of credit.
	<i>All other fields can be left blank</i>



Maintaining Grants – Set-Up Values Job Aid

Statewide Management, Accounting and Reporting Tool



Field Name	Description
Effective Date	Use the Effective Date of the current date for newly created values. If updating an existing value use the appropriate date the change should be effective upon.
Status	Use the available statuses of Active or Inactive
Attribute Type	Select an attribute type to associate with the sponsor, if applicable
Attribute Value	This should default based on the value associated with the attribute type when it was created

Menu

Search:

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 - Offices
 - Departments
- Sponsors
 - General Information
 - Facilities Admin Rates
 - Guidelines
 - Budget Items
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 - Grants Center
- Set Up Financials/Supply Chain
- Worklist
- Reporting Tools
- PeopleTools
- Change My Password
- My System Profile

Menu

Search:

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- Reporting Tools
- PeopleTools
- Change My Password
- My System Profile

Home | Worklist | Add to Favorites | Sign out

General Info | Details | Attributes | **Bill To Options** | Ship To Options | Sold To Options

SetID: SOKID Sponsor: 000000000000002 U.S. Environmental Protection Agency

Customer Bill To Options Find | View All First 1 of 1 Last

*Effective Date: 12/08/2009 *Status: Active Currency Code: USD Rate Type: CRRNT

Responsibilities:

Credit Analyst: 001 Collector: 3RDPARTY AR Specialist:

Bill Inquiry Phone: Billing Specialist: Billing Authority:

Billing Options

☒ Direct Invoicing

☐ Prompt for Billing Currency

*Freight Bill Type: Shipping

Bill Type:

Billing Cycle Identifier:

Invoice Form: STANDARD

Bill By Identifier: CONTRACT

AR Distribution Code:

Billing Consolidation Data

Consolidation Key:

SetID: Customer ID:

Blanket Purchase Orders

Blanket PO Number:

Start Date: End Date:

☐ Purchase Order Required

☐ Disable Prices on Receipt

InterUnit Billing

☐ InterUnit Customer

GL Business Unit:

Deposit Percent:

Reference Qualifier Code:

Payment Method Options

Payment Method:

Draft Type:

Direct Debit Group:

Bank Account:

Draft Document Required:

Draft Approval:

Direct Debit Profile ID:

Credit Card Profile:

Payment Predictor Options

☐ Partial Payment Switch

☐ Payment Predictor Hold

Method:

Payment Terms

Payment Terms ID:

Description:

Discount Grace Days:

Due Grace Days:

Write-Off Info

Maximum Write-Off Amount: 9999999999999.990

Maximum Write-Off Percent: 100

Days Until Write-Off:

Bank Holiday Options: Not Applicable

Days: ☐

☒ Allow due date in next month

[General Info](#) | [Bill To Selection](#) | [Credit Profile](#)

[Return to Sponsors](#)

[General Info](#) | [Details](#) | [Attributes](#) | [Bill To Options](#) | [Ship To Options](#) | [Sold To Options](#) | [Miscellaneous General Info](#)

Field Name	Description
Effective Date	Use the Effective Date of the current date for newly created values. If updating an existing value use the appropriate date the change should be effective upon.
Status	Use the available statuses of Active or Inactive
Credit Analyst	Select the valid value "001"
Collector	Select from valid values 3RDPARTY and SETOFF



Maintaining Grants – Set-Up Values Job Aid

Statewide Management, Accounting and Reporting Tool



AR Specialist	Select the valid value of your agency number
Direct Invoicing	Check this box to indicate that direct invoicing is an option for billing this sponsor
Bill Type	Select <i>CA</i> to indicate billing will begin from Customer Contracts
Invoice Form	Select <i>STANDARD</i>
Bill by Identifier	Select <i>CONTRACT</i>
	<i>Leave the remaining fields either blank or with the default value</i>

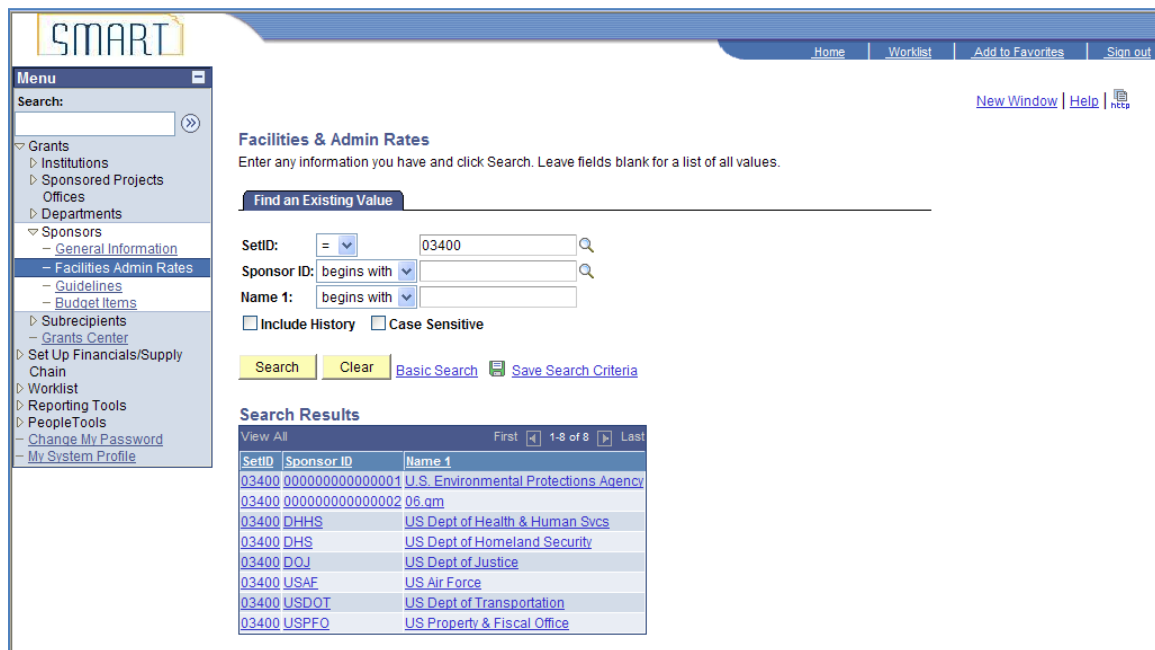
Do not complete any additional fields on the remaining tabs

Update and Maintain Sponsor Facilities Admin Rates

ROLE: AGENCY GRANTS MAINTAINER

PATH: Grants > Sponsors > Facilities Admin Rates

Here you can find existing Sponsors under which you can associate Facilities Admin Rates



Facilities & Admin Rates
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

SetID:

Sponsor ID:

Name 1:

☐ Include History ☐ Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

Search Results

View All First 1-8 of 8 Last

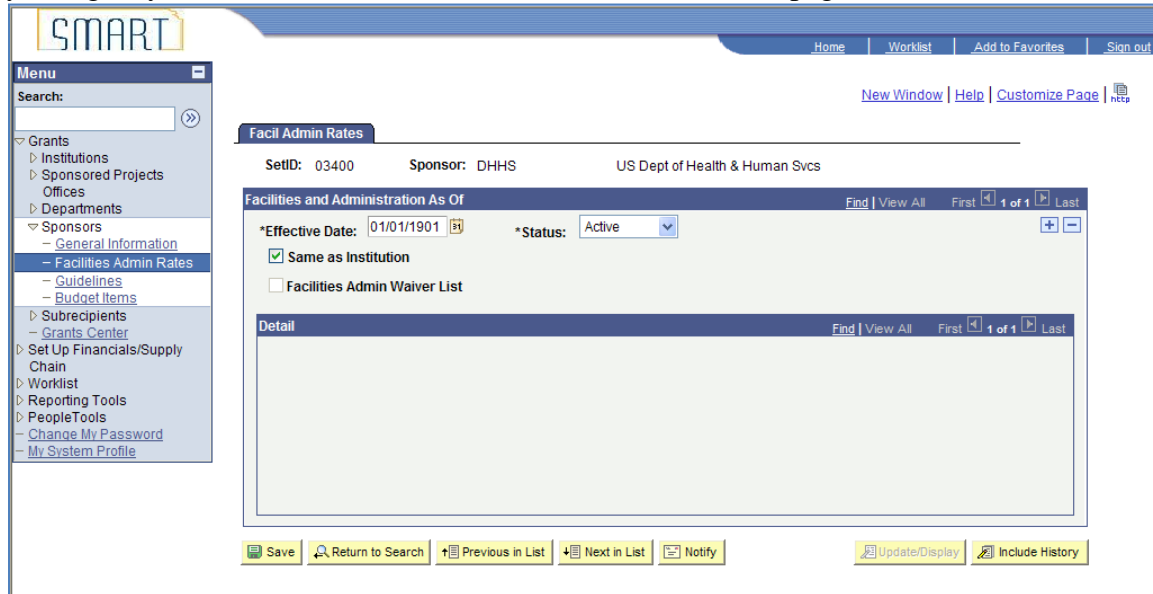
SetID	Sponsor ID	Name 1
03400	0000000000000001	U.S. Environmental Protections Agency
03400	0000000000000002	06.gm
03400	DHHS	US Dept of Health & Human Svcs
03400	DHS	US Dept of Homeland Security
03400	DOJ	US Dept of Justice
03400	USAF	US Air Force
03400	USDOT	US Dept of Transportation
03400	USPFO	US Property & Fiscal Office

The **Sponsor Facilities Admin Rates** page maintains a record of the various facilities & administrative (F&A) rates associated with a given grant sponsor. Some sponsors establish different F&A rates for their different funding programs. For example, U.S. Department of Education research grants typically allow institutions to use the full research F&A rate contained in their institutional F&A rate agreement, but training grants are limited to 8% of total direct costs. The Sponsor Facilities Admin Rates page will define the programs in which sponsors have limited the F&A an applicant institution may request in its proposal budget. The FMS Projects/Grants Team has worked with the state agencies to identify Sponsor F&A Rates and has performed the initial configuration to include the Sponsor F&A Rates. Agencies will be able to maintain Sponsor F&A Rates after implementation. Sponsor F&A Rates will be setup under the agency-specific SetID.

Maintaining Grants – Set-Up Values Job Aid

Statewide Management, Accounting and Reporting Tool

You can set your Sponsor F&A Rate to the Same as Institution to use the F&A you're your agency defined on the Institution Facilities Admin Rate page



SMART

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[New Window](#) | [Help](#) | [Customize Page](#) | [Help](#)

Facil Admin Rates

SetID: 03400 Sponsor: DHHS US Dept of Health & Human Svcs

Facilities and Administration As Of Find | View All First 1 of 1 Last

*Effective Date: 01/01/1901 *Status: Active

☒ Same as Institution

☐ Facilities Admin Waiver List

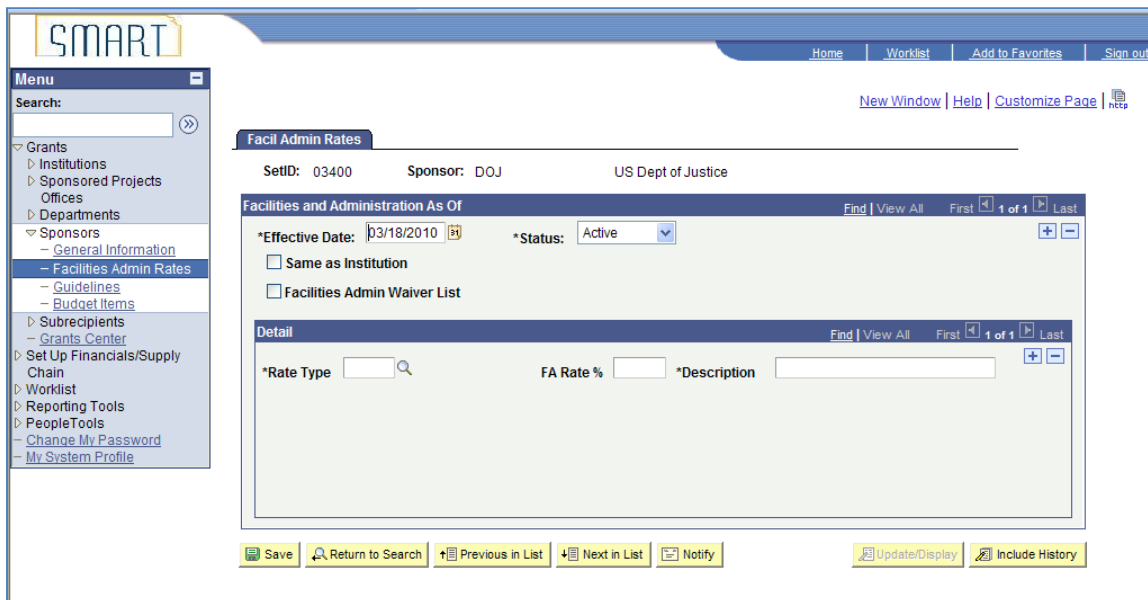
Detail Find | View All First 1 of 1 Last

Save Return to Search Previous in List Next in List Notify Update/Display Include History

Maintaining Grants – Set-Up Values Job Aid

Statewide Management, Accounting and Reporting Tool

Here you may update or add Sponsor F&A Rates



The screenshot shows the SMART web application interface. On the left is a 'Menu' with various navigation options. The main content area is titled 'Facil Admin Rates'. It displays 'SetID: 03400', 'Sponsor: DOJ', and 'US Dept of Justice'. Below this, there are fields for '*Effective Date: 03/18/2010' and '*Status: Active'. There are checkboxes for 'Same as Institution' and 'Facilities Admin Waiver List'. A 'Detail' section at the bottom has fields for '*Rate Type', 'FA Rate %', and '*Description'. Navigation buttons like 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', 'Update/Display', and 'Include History' are at the bottom.

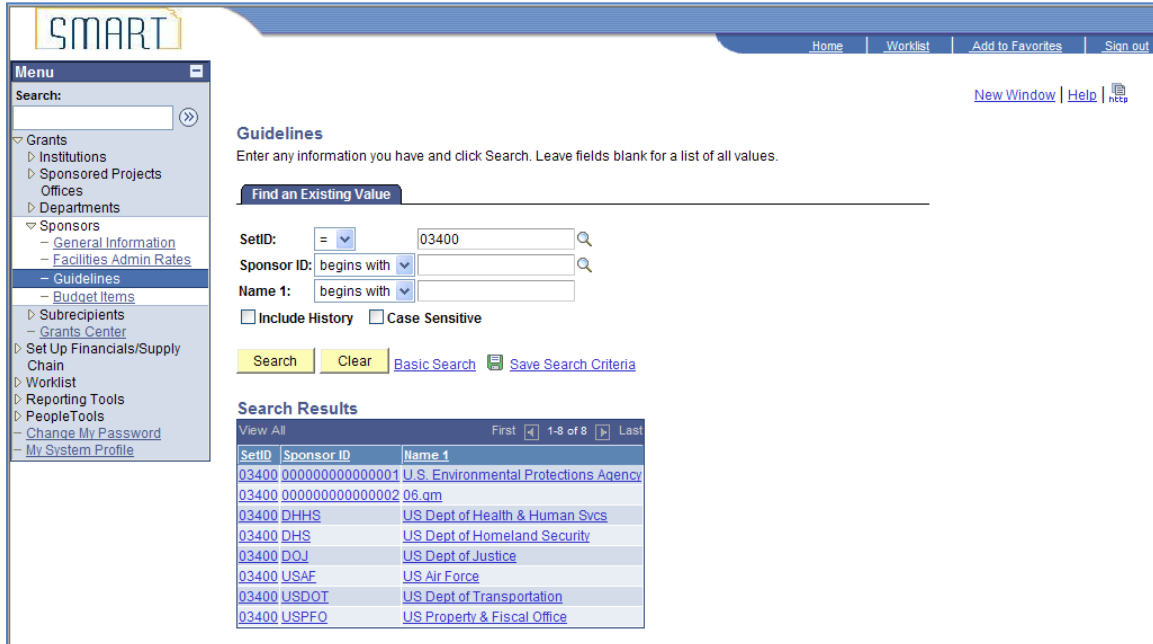
Field Name	Description
Effective Date	Use the Effective Date of the current date for newly created values. If updating an existing value use the appropriate date the change should be effective upon.
Status	Use the available statuses of Active or Inactive
Same as Institution	Select this check box if the sponsor uses the same rates as the institution and you have no rates to define for the sponsor
Facilities Admin Waiver List	Select this check box if the sponsor is on an F&A waiver list, and then enter a waiver reason. The Grants module uses the rates for budgeting purposes. The Waiver Reason field does not appear until you select the Facilities Admin Waiver List check box.
Rate Type	Enter the Rate Type
FA Rate %	Enter the F&A Rate percentage
Description	Enter a description for each F&A Rate type

Update and Maintain Sponsor Guidelines

ROLE: AGENCY GRANTS MAINTAINER

PATH: Grants > Sponsors > Guidelines

Here you can find existing Sponsors under which you can add Guidelines



Guidelines
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

SetID:

Sponsor ID: begins with

Name 1: begins with

☐ Include History ☐ Case Sensitive

[Basic Search](#)

Search Results

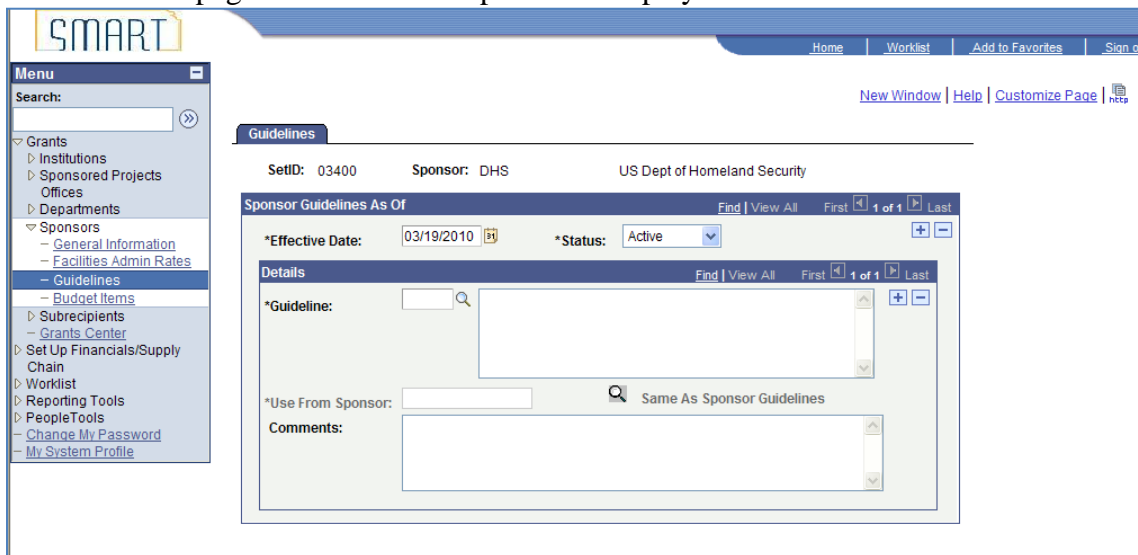
SetID	Sponsor ID	Name 1
03400	0000000000000001	U.S. Environmental Protections Agency
03400	0000000000000002	06.gm
03400	DHHS	US Dept of Health & Human Svcs
03400	DHS	US Dept of Homeland Security
03400	DOJ	US Dept of Justice
03400	USAF	US Air Force
03400	USDOT	US Dept of Transportation
03400	USPFO	US Property & Fiscal Office

Grant sponsors provide their grantees with guidelines regarding proposal submission and award administration. These guidelines define the rules and regulations by which the grantee must manage the project scope and funding. The **Guidelines** page maintains a record of the specific restrictions set by a sponsor for grantee reference, as well as any pertinent comments to aide in observance of those restrictions. The FMS Projects/Grants Team has worked with the state agencies to identify Sponsor Guidelines and has performed the initial configuration to include the Sponsor Guidelines. Agencies will be able to maintain Sponsor Guidelines after implementation. Sponsor Guidelines will be setup under the agency-specific SetID.

Maintaining Grants – Set-Up Values Job Aid

Statewide Management, Accounting and Reporting Tool

The Guideline page for the selected sponsor is displayed



The screenshot shows the SMART web application interface. On the left is a 'Menu' sidebar with a search bar and a tree view containing categories like Grants, Sponsors, and Guidelines. The main content area is titled 'Guidelines' and displays information for SetID: 03400 and Sponsor: DHS (US Dept of Homeland Security). It includes a 'Sponsor Guidelines As Of' section with fields for 'Effective Date' (03/19/2010) and 'Status' (Active). Below this is a 'Details' section with a 'Guideline' lookup field, a 'Use From Sponsor' field set to 'Same As Sponsor Guidelines', and a 'Comments' text area. Navigation links like 'Home', 'Worklist', and 'Sign out' are visible at the top right.

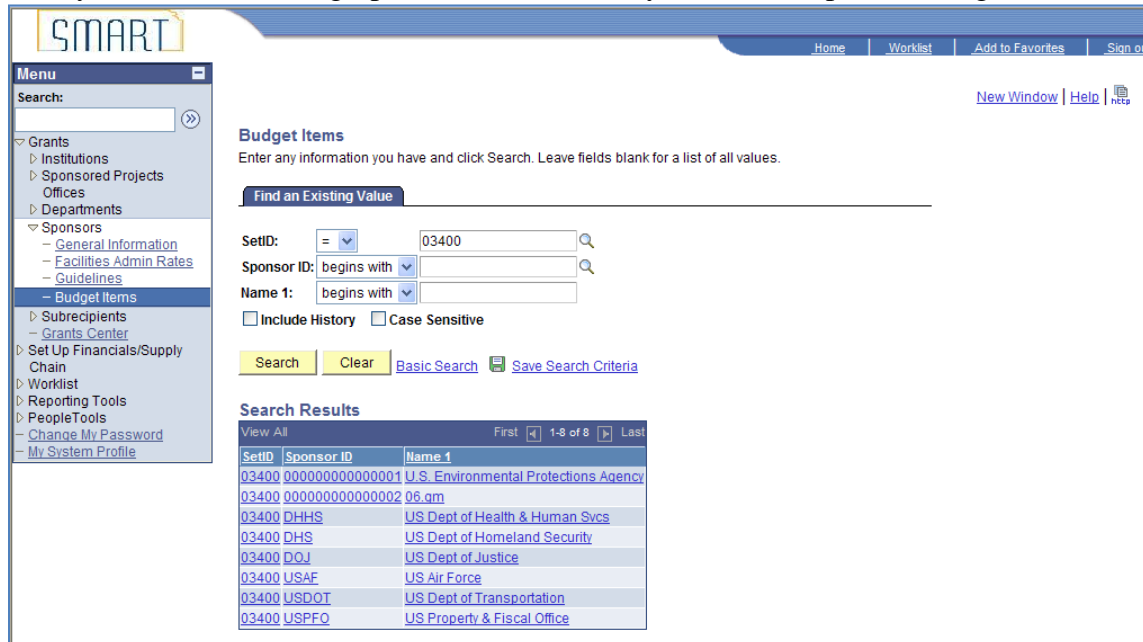
Field Name	Description
Effective Date	Use the Effective Date of the current date for newly created values. If updating an existing value use the appropriate date the change should be effective upon.
Status	Use the available statuses of Active or Inactive
Guideline	Choose a guideline from the lookup menu
Comments	Insert any additional comments regarding the guideline

Update and Maintain Sponsor Budget Items

ROLE: AGENCY GRANTS MAINTAINER

PATH: Grants > Sponsors > Budget Items

Here you can find existing Sponsors under which you can add Sponsor Budget Items



Budget Items
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

SetID:

Sponsor ID:

Name 1:

☐ Include History ☐ Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

Search Results

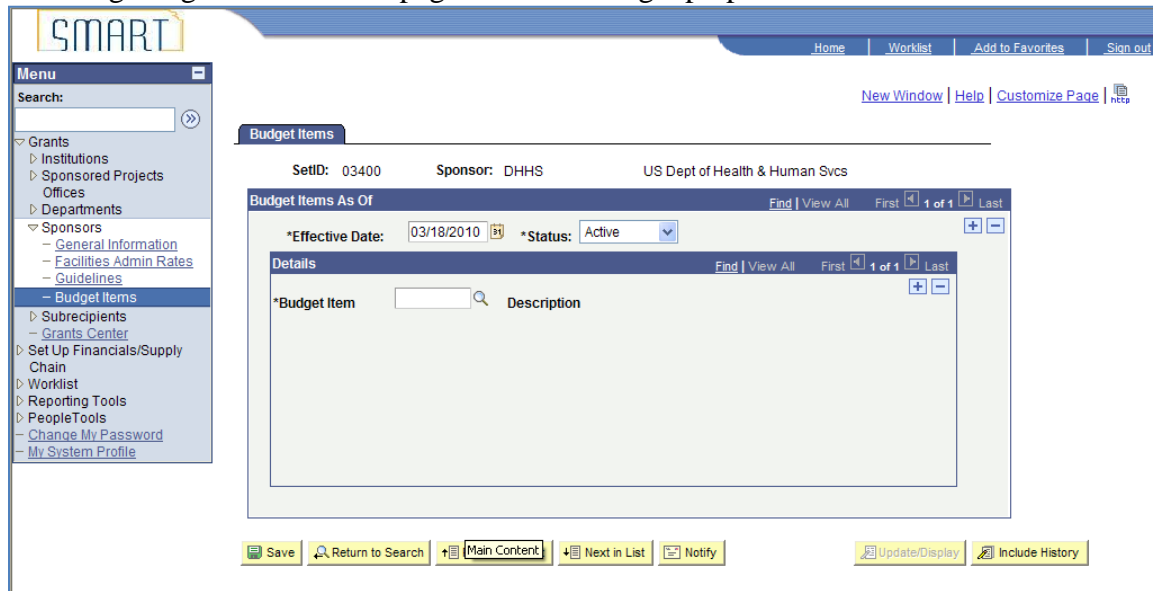
SetID	Sponsor ID	Name 1
03400	0000000000000001	U.S. Environmental Protections Agency
03400	0000000000000002	06.gm
03400	DHHS	US Dept of Health & Human Svcs
03400	DHS	US Dept of Homeland Security
03400	DOJ	US Dept of Justice
03400	USAF	US Air Force
03400	USDOT	US Dept of Transportation
03400	USPFO	US Property & Fiscal Office

Budget Items provide a way of identifying and grouping transactions that the system uses to identify a project activity's budget costs or revenue for a given period. Sponsor Budget Items can be setup to limit the initial budget items chosen when creating the proposal budget. Select the budget items you want to associate with the sponsor. The FMS Projects/Grants Team has worked with the state agencies to identify Sponsor Budget Items and has performed the initial configuration to include the Sponsor Budget Items. Agencies will be able to maintain Sponsor Budget Items after implementation. Sponsor Budget Items will be setup under the agency-specific SetID.

Maintaining Grants – Set-Up Values Job Aid

Statewide Management, Accounting and Reporting Tool

Selecting budget items on this page assists in budget preparation



The screenshot shows the SMART web application interface. On the left is a 'Menu' sidebar with options like Grants, Sponsors, and Budget Items. The main area is titled 'Budget Items' and shows details for SetID: 03400, Sponsor: DHHS, and US Dept of Health & Human Svcs. It includes a search bar, a table for 'Budget Items As Of', and a 'Details' section with a table for 'Budget Item' and 'Description'. Navigation buttons like 'Save', 'Return to Search', and 'Main Content' are at the bottom.

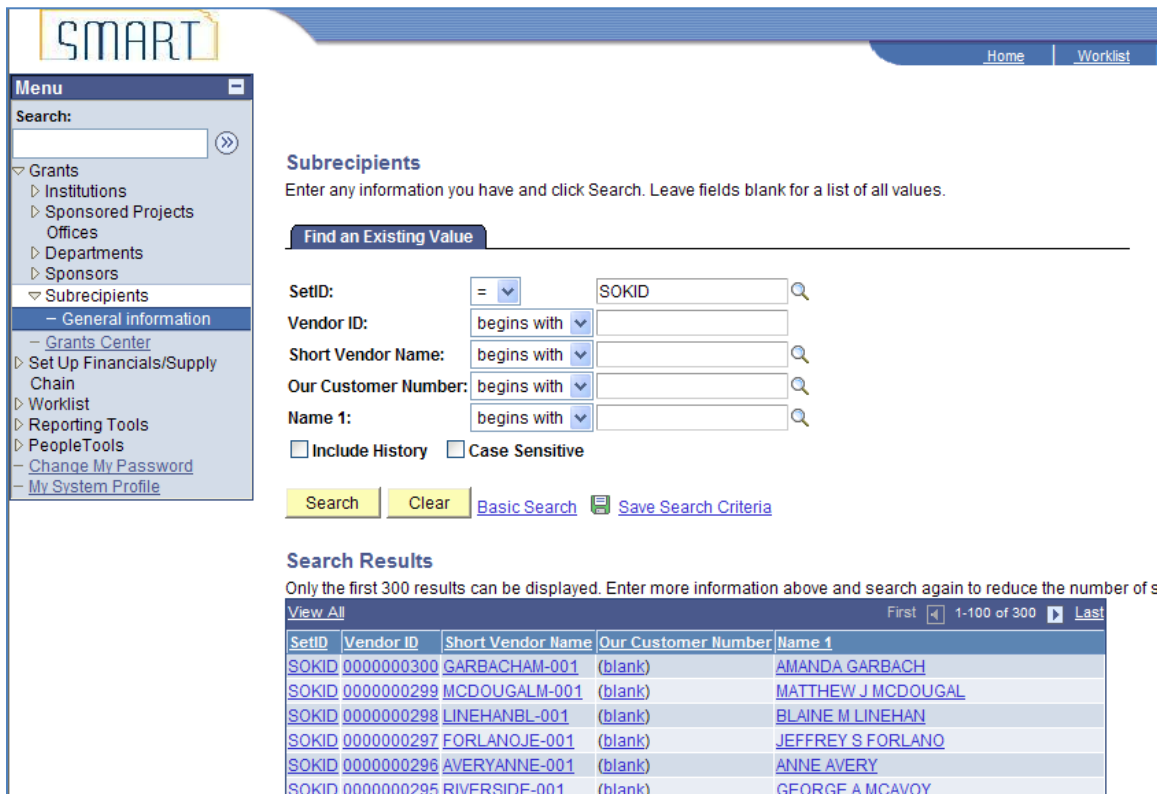
Field Name	Description
Effective Date	Use the Effective Date of the current date for newly created values. If updating an existing value use the appropriate date the change should be effective upon.
Status	Use the available statuses of Active or Inactive
Budget Item	Select the budget items you want to associate with the sponsor

Update and Maintain Subrecipients

ROLE: AGENCY GRANTS MAINTAINER

PATH: Grants > Subrecipients > General Information

Here you can find existing Subrecipients under which you can add Subrecipient information



The screenshot shows the SMART web application interface for searching subrecipients. On the left is a navigation menu with options like Grants, Institutions, Sponsored Projects, Offices, Departments, Sponsors, Subrecipients (selected), and General information. The main area is titled 'Subrecipients' and contains a search form. The search form has fields for SetID, Vendor ID, Short Vendor Name, Our Customer Number, and Name 1, each with a dropdown menu and a search icon. There are also checkboxes for 'Include History' and 'Case Sensitive'. Below the search form are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. The search results section shows a table with columns: SetID, Vendor ID, Short Vendor Name, Our Customer Number, and Name 1. The table lists six subrecipients, each with a unique SetID and Vendor ID, and a name.

Subrecipients
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

SetID: = SOKID
Vendor ID: begins with
Short Vendor Name: begins with
Our Customer Number: begins with
Name 1: begins with

☐ Include History ☐ Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

Search Results
Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of s

[View All](#) First 1-100 of 300 [Last](#)

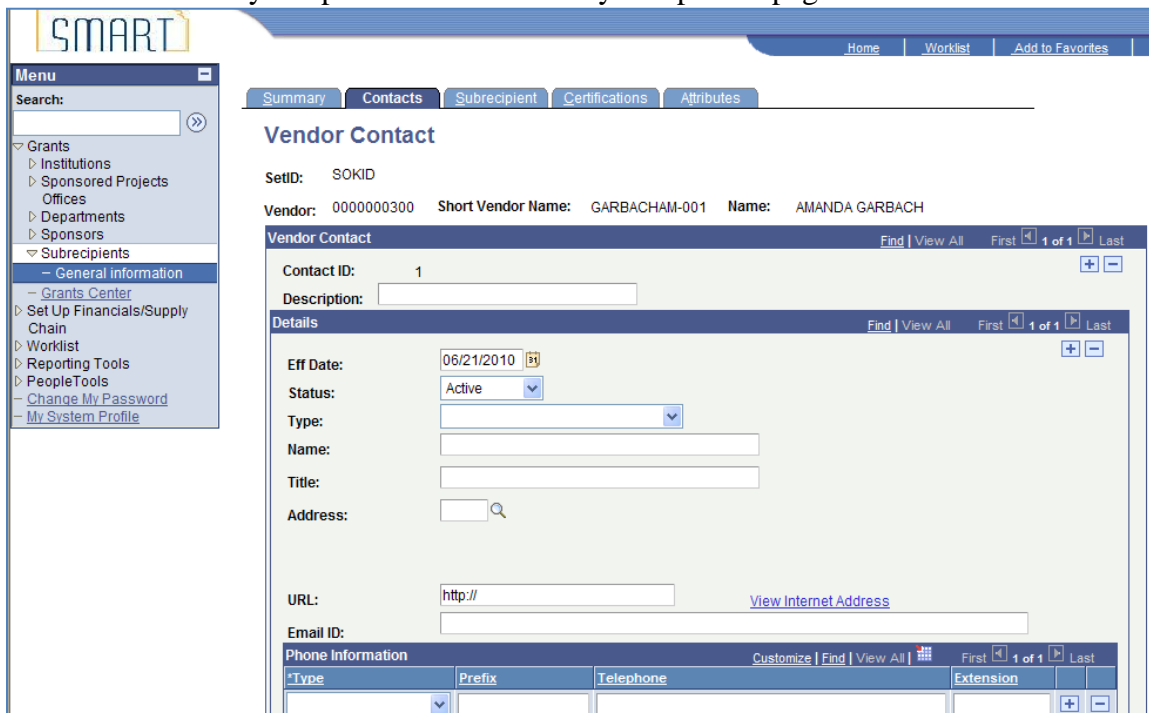
SetID	Vendor ID	Short Vendor Name	Our Customer Number	Name 1
SOKID 0000000300	GARBACHAM-001	(blank)	AMANDA GARBACH	
SOKID 0000000299	MCDUGALM-001	(blank)	MATTHEW J MCDUGAL	
SOKID 0000000298	LINEHANBL-001	(blank)	BLAINE M LINEHAN	
SOKID 0000000297	FORLANOJE-001	(blank)	JEFFREY S FORLANO	
SOKID 0000000296	AVERYANNE-001	(blank)	ANNE AVERY	
SOKID 0000000295	RIVERSIDE-001	(blank)	GEORGE A MCAVOY	

A **Subrecipient** is a third-party organization receiving grant funds from a state agency for performing a portion of work on a state- or federally-sponsored project. Although transactions to subrecipients are not considered to be for the purchase of goods and services, subrecipients are treated similarly to vendors in the PeopleSoft environment. Subrecipient's records and pages support the grants application process. Since a subrecipient is treated as a vendor in the system, the vendor pages must be set up first. Then, information specific to grant subrecipients (general information, certifications, and attributes) is completed in the Grants module in using the Subrecipient General Information page. Since this is a shared table, please be cautious about updating existing values that may be used by other agencies.

Maintaining Grants – Set-Up Values Job Aid

Statewide Management, Accounting and Reporting Tool

You have the ability to update information on your sponsor pages



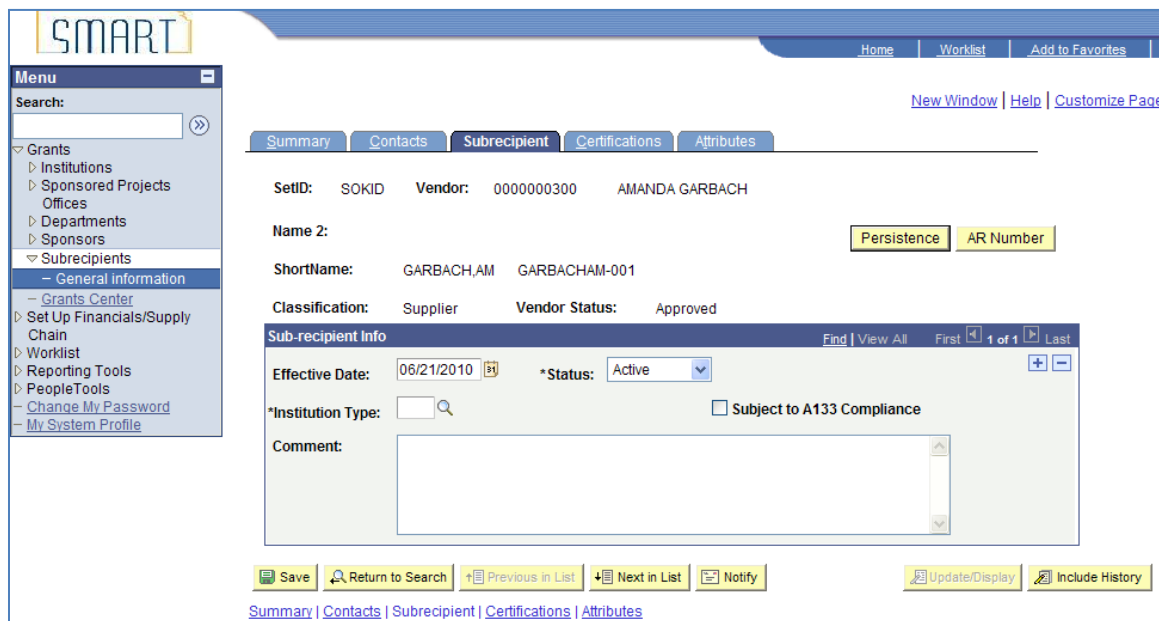
The screenshot shows the SMART application interface. On the left is a 'Menu' sidebar with a search bar and a tree view containing categories like Grants, Institutions, Sponsored Projects, Offices, Departments, Sponsors, and Subrecipients. The 'Subrecipients' category is expanded, showing 'General Information' and 'Grants Center'. The main content area is titled 'Vendor Contact' and includes tabs for Summary, Contacts, Subrecipient, Certifications, and Attributes. The 'Contacts' tab is active, displaying details for a vendor with SetID: SOKID, Vendor: 0000000300, Short Vendor Name: GARBACHAM-001, and Name: AMANDA GARBACH. Below this is a 'Vendor Contact' section with a 'Contact ID' of 1 and a 'Description' field. A 'Details' section follows with fields for Eff Date (06/21/2010), Status (Active), Type (a dropdown menu), Name, Title, Address, URL (http://), and Email ID. At the bottom is a 'Phone Information' section with a table for entering phone details.

*Type	Prefix	Telephone	Extension

Field Name	Description
Effective Date	Use the Effective Date of the current date for newly created values. If updating an existing value use the appropriate date the change should be effective upon.
Status	Use the available statuses of Active or Inactive
Type	Select the appropriate contact type from the drop-down menu, if applicable
Name	Enter the contact name
Title	Enter the contact's job title
Address	Select an address for the contact
Email ID	Enter the contact's email
*Type	Select the type of phone number being entered
Prefix	Enter the area code
Telephone	Enter the phone number
Extension	Enter the extension, if applicable

Maintaining Grants – Set-Up Values Job Aid

Statewide Management, Accounting and Reporting Tool



The screenshot shows the SMART web application interface. On the left is a 'Menu' sidebar with options like Grants, Subrecipients, and various tools. The main content area has tabs for Summary, Contacts, Subrecipient, Certifications, and Attributes. The 'Subrecipient' tab is active, displaying details for a subrecipient named AMANDA GARBACH. Fields include SetID (SOKID), Vendor (0000000300), Name 2 (GARBACH,AM), ShortName (GARBACH,AM GARBACHAM-001), Classification (Supplier), and Vendor Status (Approved). A 'Sub-recipient Info' section contains an Effective Date (06/21/2010), Status (Active), Institution Type (lookup), and a checkbox for 'Subject to A133 Compliance'. A large text area for 'Comment' is at the bottom. Navigation buttons like Save, Return to Search, Previous in List, Next in List, Notify, Update/Display, and Include History are at the bottom of the form.

Field Name	Description
Effective Date	Use the Effective Date of the current date for newly created values. If updating an existing value use the appropriate date the change should be effective upon.
Status	Use the available statuses of Active or Inactive
Institution Type	Select a valid value from the lookup
Subject to A133 Compliance	Check this box if the subrecipient should be subject to A-133 flow-through terms for subrecipient monitoring purposes
Comment	Enter any comments applicable to the subrecipient, if desired



Maintaining Grants – Set-Up Values Job Aid

Statewide Management, Accounting and Reporting Tool



Field Name	Description
Effective Date	Use the Effective Date of the current date for newly created values. If updating an existing value use the appropriate date the change should be effective upon.
Status	Use the available statuses of Active or Inactive
Code	Select a valid certification/compliance code from the lookup
Indicator	Select <i>Yes</i> , <i>No</i> , <i>Pending</i> or <i>N/A</i> to indicate whether the subrecipient is in compliance
Cert/Disclosure Date	Enter the date the certification became effective
End Date	Enter the date the certification expires
Reference Number	Enter any type of reference number associated with the certification
Customer	Identify the sponsor of the grant/project associated with the certification
Comment	Enter any comments applicable to the certification, if desired



Maintaining Grants – Set-Up Values Job Aid

Statewide Management, Accounting and Reporting Tool



SMART Statewide Management, Accounting and Reporting Tool

Home | Worklist | Add to Favorites

[New Window](#) | [Help](#) | [Customize Page](#)

Menu

Search:

- Grants
 - Institutions
 - Sponsored Projects
 - Offices
 - Departments
 - Sponsors
- Subrecipients
 - General Information
 - Grants Center
 - Set Up Financials/Supply Chain
 - Worklist
 - Reporting Tools
 - PeopleTools
 - Change My Password
 - My System Profile

Summary | **Contacts** | **Subrecipient** | **Certifications** | **Attributes**

SetID: SOKID Vendor: 0000000300 AMANDA GARBACH

Vendor Attributes As Of Find | View All First 1 of 1 Last

Effective Date: 06/21/2010 *Status: Active Entered By: KPC_AGY_GRANTS_MAINTAINER

Attribute Type	Short Desc	Attribute Value	Comment
<input type="text"/>		<input type="text"/>	<input type="text"/>

Save | Return to Search | Previous in List | Next in List | Notify | Update/Display | Include History

Field Name	Description
Effective Date	Use the Effective Date of the current date for newly created values. If updating an existing value use the appropriate date the change should be effective upon.
Status	Use the available statuses of Active or Inactive
Attribute Type	Select a valid attribute type from the lookup
Attribute Value	Enter an attribute value
Comment	Enter any comments applicable to the attribute, if desired